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1981

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Market Research Division
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Footwear (Men's, Women's and Children's) 1981

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TABLE OF CONTENTS

	Page
MARKET TRENDS	1
GENERAL STATISTICS ON THE INDUSTRY	2
EMPLOYMENT & EARNINGS	5
INDUSTRY CONCENTRATION	6
LOCATION OF THE INDUSTRY	8
LEADING MANUFACTURERS AND OPERATING RESULTS	9
PRODUCTION	11
SHIPMENTS	15
FACTORY PRICES	23
FOREIGN TRADE — IMPORTS	24
FOREIGN TRADE — EXPORTS	29
MARKET SUPPLY	32
RETAIL TRADE	33
CONSUMER EXPENDITURES	34
ATHLETIC FOOTWEAR	36
CONSUMER PRICE TRENDS	37
SALES BY AREA	37
SALES BY TYPE OF OUTLET	39
SHOE STORES	43
DEPARTMENT STORES	48
APPAREL SPECIALTY STORES	49
BUYING HABITS	50
CHILDREN'S SHOES	51
BUYING HABITS — MEN	54
BUYING HABITS -- WOMEN	61
SCHEDULE OF ADDITIONAL FACT FILES	68

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MEN'S, WOMEN'S & CHILDREN'S FOOTWEAR

Market Trends

A key factor in the outlook for the U.S. footwear industry—particularly for makers of lower-priced, unbranded footwear which are the smaller manufacturers—is the decision of the Reagan administration (announced at the end of June 1981) not to renew the Orderly Marketing Agreements (OMA's). These agreements had established voluntary quotas controlling footwear imports from Taiwan and South Korea, and had been in effect for four years.

This action is generally expected to result in greater availability of low-priced shoes in the U.S. market, but it is uncertain just how great an upsurge there will be in imports from these two sources. South Korea, which is mainly concerned with the production of athletic footwear—a shoe type in whic U.S. manufacturers are strongly competitive—has already imposed its own "voluntary" restraint system limiting shipments of athletic shoes to 45 million pairs in the next 12 months. There are indications that Taiwan, too, might impose restrictions on itself to prevent surges in shipments to the U.S. that might lead to restrictions in the future, as well as to keep prices from plummeting.

Prior to the elimination of the OMA's, shipments of nonrubber footwear in terms of pairage were expected to increase 2% in 1981, reversing a four-year decline, according to the U.S. Department of Commerce.

In 1980, nonrubber footwear shipments were valued at $4.5 billion, 6.2% more than 1979. Per capita consumption was 3.4 pairs, down from 3.7 pairs in 1979. However, per capita expenditures increased to an estimated $31.07 in 1980 compared with an estimated $30.04 in 1979.

Leather was still the predominant material used for nonrubber footwear uppers. Nearly 52% of U.S.-produced footwear of this type had uppers of leather. The 1980 factory price of leather used in footwear manufacturing declined 12.3% from record levels set in 1979.

Imports of nonrubber footwear declined to their lowest level since 1975. At 366 million pairs (as measured by the Department of Commerce), imports were 9.6% below the 1979 level. The import penetration level, which had risen above 50% for the first time in 1979, slipped to 49% in 1980. After being in force since mid-1977, the Orderly Marketing Agreements limiting nonrubber footwear imports from Taiwan and Korea were allowed to expire on June 30, 1981. During this time, imports from these two countries were reduced to 50% of total nonrubber footwear imports compared to 61% in 1977. Imports from uncontrolled countries increased an average of about 10% annually in this time.

The continued rise in U.S. exports of nonrubber footwear influenced the U.S. Government's decision to terminate the OMA's. Since 1977, exports have risen 220.0% in value and 141.0% in pairage to $112 million and 13.0 million pairs, respectively.

(continued)

MEN'S, WOMEN'S & CHILDREN'S FOOTWEAR

Market Trends

Apparent U.S. consumption of rubber and plastics footwear was 253.6 million pairs, of which about 75% was footwear with fabric uppers and rubber or plastics soles. Imports accounted for about 60% of this market. Little real growth is expected in the domestic rubber footwear industry in the near future.

The U.S. International Trade Commission reported first quarter 1981 domestic nonrubber footwear production at 95.8 million pairs, down 8% from the same 1980 period. Nonrubber footwear imports amounted to 106.7 million pairs, 3% higher than 1980's first quarter, while exports, at 3.2 million pairs, were 9% higher.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The 1978 annual survey of manufactures, compiled by the U.S. Census Bureau, covers the latest available industry information on footwear at the manufacturer level. The ASM is based on a sample of U.S. manufacturers and is conducted in interim years between the complete census of manufactures which is conducted every five years. The 1978 ASM data are adjusted for comparability with the latest census report (1977).

Data on the various segments of the footwear industry in the U.S., as classified in the Census Bureau reports, are summarized in the following tables.

According to the U.S. International Trade Commission, the number of firms with 10 or more employees producing nonrubber footwear declined to 307 in 1980 from 334 in 1977. The value of shipments, secondary products and miscellaneous receipts of all plants classified in the nonrubber footwear industry totaled $4.1 billion in 1978. The projected value for 1979 totals $4.4 billion, and for 1980, $4.8 billion, according to the U.S. Bureau of Industrial Economics. A forecast for 1981 by this source placed the value of industry shipments at $5.3 billion. (1981 U.S. Industrial Outlook)

Estimates by the American Footwear Industries Association (AFIA), placed the number of nonrubber footwear plants at 741 in 1980, representing an 8.6% decline compared with 1977. Much of the decrease occurred among plants producing fewer than 200,000 pairs of shoes annually.

GENERAL STATISTICS ON THE INDUSTRY

The U.S. Manufacturing Industry By Type of Footwear, 1972, 1977

	1978	1977	1972	% Change 1978/1977
NONRUBBER FOOTWEAR, TOTAL (SIC 314)				
Number of companies	na	541	645	--
Number of establishments#	na	811	917	--
With 20 or more employees	na	603	712	--
All employees (thous.)	143.8	145.5	176.1	- 1.2%
Production workers (thous.)	128.6	129.3	157.1	- 0.5
Payroll (mil. $)	$1,101.2	$1,031.5	$ 972.7	+ 6.8
Value added by manufacture (mil. $)**	2,183.7	2,069.4	1,796.2	+ 5.5
Value of shipments (mil. $)***	4,141.3	3,891.7	3,272.2	+ 6.4
Capital expenditures, new (mil. $)	40.7	37.1	37.1	+ 9.7
MEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3143*)				
Number of companies	na	115	115	--
Number of establishments#	na	213	221	--
With 20 or more employees	na	180	197	--
All employees (thous.)	54.2	55.0	61.5	- 1.5%
Production workers (thous.)	48.8	49.2	54.4	- 0.8
Payroll (mil. $)	$ 444.3	$ 417.0	$ 358.1	+ 6.5
Value added by manufacture (mil. $)**	896.5	871.9	674.4	+ 2.8
Value of shipments (mil. $)***	1,827.3	1,734.5	1,288.9	+ 5.3
Capital expenditures, new (mil. $)	18.0	14.5	14.3	+ 25.9
WOMEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3144*)				
Number of companies	na	243	296	--
Number of establishments#	na	328	422	--
With 20 or more employees	na	241	316	--
All employees (thous.)	56.2	57.6	77.4	- 2.4%
Production workers (thous.)	50.5	51.3	70.0	- 1.6
Payroll (mil. $)	$ 408.7	$ 388.6	$ 408.4	+ 5.2
Value added by manufacture (mil. $)**	798.4	755.0	763.6	+ 5.7
Value of shipments (mil. $)***	1,428.4	1,361.2	1,346.1	+ 4.9
Capital expenditures, new (mil. $)	12.4	9.7	14.8	+ 27.8
HOUSE SLIPPERS (SIC 3142*)				
Number of companies	na	65	82	--
Number of establishments#	na	78	91	--
With 20 or more employees	na	55	66	--
All employees (thous.)	8.1	8.1	8.5	--
Production workers (thous.)	6.9	7.0	7.1	- 1.4%
Payroll (mil. $)	$ 58.9	$ 54.5	$ 48.1	+ 8.1
Value added by manufacture (mil. $)**	136.0	108.8	85.7	+ 25.0
Value of shipments (mil. $)***	232.0	201.2	151.4	+ 15.3
Capital expenditures, new (mil. $)	2.5	2.3	1.6	+ 8.7

(continued)

GENERAL STATISTICS ON THE INDUSTRY

The U.S. Manufacturing Industry By Type of Footwear, 1972, 1977
(continued)

	1978	1977	1972	% Change 1978/1977
FOOTWEAR, EXCEPT RUBBER, NOT ELSEWHERE CLASSIFIED (SIC 3149*)				
Number of companies	na	159	152	--
Number of establishments#	na	192	183	--
With 20 or more employees	na	127	133	--
All employees (thous.)	25.2	24.8	28.7	+ 1.6%
Production workers (thous.)	22.3	21.8	25.6	+ 2.3
Payroll (mil. $)	$ 189.4	$ 171.4	$ 158.1	+ 10.5
Value added by manufacture (mil. $)**	352.8	333.7	272.5	+ 5.7
Value of shipments (mil. $)***	653.6	594.8	485.8	+ 9.9
Capital expenditures, new (mil. $)	7.8	10.6	6.4	- 26.4
RUBBER & PLASTICS FOOTWEAR (SIC 302*)				
Number of companies	na	67	82	--
Number of establishments#	na	84	107	--
With 20 or more employees	na	50	74	--
All employees (thous.)	20.2	19.8	31.5	+ 2.0%
Production workers (thous.)	17.8	16.4	26.5	+ 8.5
Payroll (mil. $)	$ 164.0	$ 159.1	$ 182.6	+ 3.1
Value added by manufacture (mil. $)**	283.9	272.3	370.3	+ 4.3
Value of shipments (mil. $)***	530.0	517.0	600.0	+ 2.5
Capital expenditures, new (mil. $)	23.4	11.3	17.1	+107.1
BOOT & SHOE CUT STOCK & FINDINGS (SIC 3131*)				
Number of companies	na	174	225	--
Number of establishments#	na	190	248	--
With 20 or more employees	na	96	121	--
All employees (thous.)	9.4	8.5	8.7	+ 10.6%
Production workers (thous.)	8.3	7.4	7.6	+ 12.2
Payroll (mil. $)	$ 73.6	$ 65.3	$ 50.1	+ 12.7
Value added by manufacture (mil. $)**	117.2	109.4	86.2	+ 7.1
Value of shipments (mil. $)***	298.4	270.6	206.5	+ 10.3
Capital expenditures, new (mil. $)	3.9	3.0	2.9	+ 30.0

na = not available
# Each business location is counted as a separate establishment.
* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) System determined by the principal product manufactured, as shown below:

SIC 3143 comprises establishments primarily engaged in the production of men's dress and casual shoes, boots and work shoes. Footwear produced in this industry is primarily of leather.

SIC 3144 comprises establishments primarily engaged in the production of women's dress and casual shoes, sandals and boots. Footwear produced in this industry is primarily of leather.

SIC 3142 comprises establishments primarily engaged in the production of house slippers of leather or other materials. Slipper socks are included in this industry.

SIC 3149 comprises establishments primarily producing footwear not classified in the above industries or in SIC 3021 (rubber and plastic). Included in SIC 3149 are shoes for infants and babies, children, misses, youths and boys. Also included are all athletic shoes, theatrical shoes, and beach slippers.

(continued)

(Footnotes continued)

SIC 302 comprises establishments primarily engaged in manufacturing all-rubber and plastics footwear, waterproof fabric-upper footwear having rubber or plastic soles vulcanized to the uppers. Included in this category are sneakers, athletic footwear such as jogging shoes, protective footwear and zori.

SIC 3131 comprises establishments primarily engaged in manufacturing leather soles, inner soles, and other boot and shoe cut stock and findings. This industry also includes finished wood heels. It does not include manufacturers of shoe findings made of rubber, plastic, or fiber.

**Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

***Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products, as well as miscellaneous receipts for contract work, resales, etc. This value should be clearly distinguished from the total value of footwear made by all producers, including those who make footwear as a secondary product and who are classified in other industries. This total product value is shown in the tables on pages 15-16.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1978.

Definition of other terms:

The term "nonrubber footwear," as used in this report, refers to footwear that is primarily leather, as covered in SIC 314. "Rubber/plastic" footwear refers to types covered in SIC 302.

Employment & Earnings

In the first four months of 1981, employment in the nonrubber footwear industry in the U.S. was slightly higher than in the same 1980 period. Production worker employment, which averaged 130,500 in the 1981 period was up 0.6%; total employment, which averaged 152,500, was up 0.7%.

Total employment in 1980 averaged 151,500, up 0.2% compared with 1979. However, the number of production workers was down 0.2%, averaging 129,700 in 1980. In the rubber/plastic footwear industry, total employment fell 2.1% in 1980 to 22.5 thousand compared to 23.0 thousand in 1979. Production worker employment was down about 1%.

Average hourly earnings in the nonrubber footwear industry rose 8.1% over 1979 to $4.42. Average weekly hours increased 0.8% to 36.5.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings in the U.S. Footwear Industry, 1978-1980

	Annual Average Employment (in Thousands)					
	Total Employees			Production Workers		
	1980	1979	1978	1980	1979	1978
Nonrubber footwear, total	151.5	151.2	158.4	129.7	129.9	138.1
Men's, except athletic	57.7	58.6	64.2	49.6	50.9	56.7
Women's, except athletic	60.1	60.6	61.9	51.1	51.7	53.5
Rubber/plastics footwear	22.5	23.0	24.0	19.9	20.1	21.0

	Production Workers					
	Avg. Weekly Hours			Avg. Hourly Earnings		
	1980	1979	1978	1980	1979	1978
Nonrubber footwear, total	36.5	36.2	36.9	$4.42	$4.09	$3.75
Men's, except athletic	37.2	37.2	37.8	4.66	4.28	3.89
Women's, except athletic	35.7	35.2	36.1	4.26	3.93	3.65
Rubber/plastics footwear	41.6	38.2	38.2	4.43	4.12	3.80

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment & Earnings Supplement, September 1980, March 1981.

Industry Concentration

The U.S. footwear industry has become increasingly concentrated among larger firms able to withstand the competition of imports. In 1979, according to the Federal Trade Commission, out of a total of 307 firms with 10 or more employees, 51 firms (17%) accounted for 69% of total nonrubber footwear production.

Nonrubber Footwear Manufacturers by Size of Output, 1978, 1979

	1979		1978	
	No. of Firms*	% of Total Production	No. of Firms*	% of Total Production
Total	307	100%	301	100%
Producers manufacturing:				
Less than 200,000 pairs	84	2	86	2
200,000 to 499,999 pairs	81	6	70	5
500,000 to 999,999 pairs	50	9	61	11
1,000,000 to 1,999,999 pairs	41	14	35	11
2,000,000 to 3,999,999 pairs	29	20	26	17
4,000,000 pairs & over	22	49	23	54

*Does not include firms employing fewer than 10 workers.

Source: U.S. International Trade Commission, Nonrubber Footwear Pub. No. 1139, April 1981, based on U.S. Bureau of the Census data.

GENERAL STATISTICS ON THE INDUSTRY

Industry Concentration

Footwear Manufacturing Establishments by Employment Size, 1977

	Men's Footwear Exc. Athletic (SIC 3143*)	Women's Footwear Exc. Athletic (SIC 3144*)	House Slippers (SIC 3142*)
Total establishments (plants)	213	328	78
Number by employment size:			
Under 20 employees	33	86	23
20-99 employees	29	69	31
100-249 employees	53	69	15
250-499 employees	76	90	8
500 or more employees	22	14	1

	Footwear, Except Rubber, n.e.c. (SIC 3149*)	Rubber and Plastics Footwear (SIC 3021*)
Total establishments (plants)	192	84
Number by employment size:		
Under 20 employees	65	34
20-99 employees	50	16
100-249 employees	38	10
250-499 employees	33	11
500 or more employees	6	13

*For a definition of these SIC codes, see page 4.
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in the Footwear Industry, 1977

	Establishments		Value of Shipments (Mil. $)	Value Added by Manufacture (Mil. $)
	No.	With 20+ Employees		
Men's footwear, exc. athletic (SIC 3143*)	213	180	$1,734.5	$871.9
New England Division:				
Maine	21	17	175.4	89.8
New Hampshire	11	10	64.8	32.4
Massachusetts	22	15	129.3	68.5
Middle Atlantic Division:				
Pennsylvania	18	17	127.4	57.8
East North Central Division:				
Wisconsin	20	19	191.6	107.9
West North Central Division:				
Missouri	12	12	(D)	(D)
East South Central Division:				
Tennessee	20	19	234.7	123.7
West South Central Division:				
Texas	15	9	65.9	34.0
Women's footwear, exc. athletic (SIC 3144*)	328	241	1,361.2	755.0
New England Division:				
Maine	30	26	180.1	101.2
New Hampshire	27	22	148.4	83.7
Massachusetts	37	25	129.8	62.8
Middle Atlantic Division:				
New York	39	23	70.3	40.6
Pennsylvania	28	25	104.6	57.6
West North Central Division:				
Missouri	24	22	172.7	92.3
West South Central Division:				
Arkansas	13	12	62.1	35.7
Pacific Division:				
California	37	24	93.2	53.1
House slippers (SIC 3143*)	78	55	201.2	108.6
Middle Atlantic Division:				
New York	21	14	53.1	28.6
Rubber & plastics footwear (SIC 3021*)	84	50	517.0	272.3
New England Division:				
Maine	3	3	18.0	7.7
New Hampshire	5	4	33.1	14.1
Middle Atlantic Division:				
Pennsylvania	8	7	35.1	19.4
Pacific Division:				
California	8	4	9.5	5.9

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in the Footwear Industry, 1977
(continued)

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual companies.
* For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

LEADING MANUFACTURERS AND OPERATING RESULTS

The combined operating profits of 10 large publicly-owned footwear manufacturers increased 12.8% in fiscal 1980 compared to a year ago. Net sales were up 8.4% over the same period. Their combined net profit rose 14.4% from fiscal 1979. These firms were among those whose annual reports were analyzed in Footwear News (July 6, 1981).

Sales & Profits of Selected Footwear Manufacturers

	Total Sales* (Mil. $)		Operating Profit* (Mil. $)		Footwear's Contribution % of Sales		% of Op. Profit	
	1980	1979	1980	1979	1980	1979	1980	1979
Interco, Inc.	$2,368	$2,024	$261	$216	24%	27%	32%	30%
Brown Group, Inc.#	1,221	1,145	92	89	69	70	80	75
U.S. Shoe Corp.	933	831	81	69	64	65	44	51
Genesco, Inc.	834	993	37	52	54	46	nr	nr
Wolverine World Wide	253	204	26	19	nr	nr	nr	nr
Stride Rite Corp.	166	136	16	11	100	100	100	100
R. G. Barry Corp.##	127	109	7	6	100	100	100	100
Craddock Terry	97	91	8	7	100	100	100	100
Suave Shoe Corp.	97	85	9	5	94	94	94	94
Weyenberg Mfg.	81	79	2	2	100	100	100	100

* Consolidated results
nr = not reported
#Fiscal 1979 contained 53 weeks.
##Fiscal 1980 contained 53 weeks.

Source: Fairchild Market Research Department, based on annual reports.

LEADING MANUFACTURERS AND OPERATING RESULTS

Selected Key Business Ratios of Footwear Manufacturers, 1980
(Median Results)

	Men's Footwear, Except Athletic (SIC 3143*)	Women's Footwear, Except Athletic (SIC 3144*)
Number of reporting firms	58	36
Current assets to current debt (times)	2.39	2.23
Net profits on net sales (percent)	3.27	3.71
Net profits on net worth (percent)	13.26	17.53
Net sales to inventory (times)	4.8	6.6
Collection period (days)	44	52

*For a definition of these SIC numbers, see page 4.

Source: Dun & Bradstreet, Key Business Ratios, All rights reserved.

U.S. producers of nonrubber footwear who responded to a survey taken by the U.S. International Trade Commission reported a 47.1% increase in pre-tax profit on their total footwear operations (manufacturing, purchasing and retailing) in 1980, although their reported net sales increased only 11.1%.

Pre-tax profits on their footwear manufacturing operations increased 68.1% on $2.3 billion in sales, a 12.0% rise over 1979. The ratio of pre-tax profit to net sales was 7.8% on manufacturing operations, and 8.2% overall. For both total operations and manufacturing operations, the ratio of operating profit to sales was similar—8.5% and 8.3%, respectively.

Net Sales & Profits of U.S. Producers of Nonrubber Footwear, 1979, 1980
(Millions of Dollars)

	Net Sales	Gross Profit	Net Operating Profit	Pre-Tax Profit	Net Operating Profit/ Net Sales
1980	$2,948.6	$789.9	$250.9	$241.6	8.5%
1979	2,654.8	648.1	170.5	160.8	6.4

NOTE: Sales and profits figures are for 68 U.S. producers of nonrubber footwear accounting for approximately 42% of total U.S. production.

Source: U.S. International Trade Commission, Nonrubber Footwear Pub. No. 1139, April 1981.

PRODUCTION

Nonrubber Footwear

U.S. production of nonrubber footwear in 1980 totaled 394.4 million pairs, 1.0% below the 1979 total of 398.5 million pairs, and marking the lowest level since 1938. Between 1979 and 1980, U.S. footwear production declined 29.9% with the sharpest declines reported in the 1970-1976 period. Since 1976 the rate of decline has slowed and this is generally attributed to the protection of import quotas in effect for the past four years as well as to a growth in U.S. exports.

Domestic output of women's nonrubber footwear amounted to 143.5 million pairs in 1980, according to preliminary figures. This is 1.7% below the 1979 total. This category is adversely affected by imports to a greater extent than any other major shoe category. In 1979, import penetration for the women's shoe market was estimated at 63.8%.

Output of men's shoes rose to 92 million pairs according to preliminary data for 1980, up slightly from the 1979 total. Imports of men's footwear represented 38.5% of the market in 1980, down from 39.9% the previous year. U.S. production of athletic shoes rose 20.2%, totaling 24.7 million pairs in 1980. Imports dominate this market, representing some 68.2% of the total domestic supply in 1980.

Summary of Production of Nonrubber Footwear by U.S. Producers, 1970, 1976-1980
(Millions of Pairs)

	1980(p)	1979(r)	1978	1977(r)	1976	1970
Nonrubber footwear	394.4	398.5	418.9	418.1	422.5	562.3
% change over previous year	- 1.0%	- 4.9%	+ 0.2%	- 1.0%	+ 2.3%	- 2.5%

(p) = preliminary
(r) = revised

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear MA-21A.

Rubber/Plastics Footwear

This classification includes footwear which is protective (such as hunting boots, galoshes, overshoes and boots), zori (a sandal-type footwear) and footwear with fabric uppers and soles of rubber or plastics (shoes commonly known as sneakers, as well as athletic shoes designed for jogging and for specific sports such as racquetball and soccer; also espadrilles).

Preliminary data indicate that rubber/plastics footwear production in the U.S. declined in 1980 due primarily to a 7.9% cut-back in production of rubber-soled, fabric upper footwear, which, as noted, is primarily athletic shoes. Output dropped to an estimated 72 million pairs compared with 78.1 million pairs in 1979. Production of rubber and plastics protective footwear rose 8.6% to 25.6 million pairs in 1980.

Import penetration in the rubber/plastics footwear industry, according to the U.S. International Trade Commission, increased from 40% in 1975 to 68% in 1978, but declined to 60% in 1980.

U.S. Production of Footwear by Type, 1978-1980
(Thousands of Pairs)

	1980(p)	1979(r)	1978(r)
Footwear, nonrubber & rubber/plastics, total	491,886	500,141	522,578
Footwear, incl. slippers (nonrubber), total	394,370	398,480	418,948
Shoes, incl. athletic (nonrubber), total	326,257	325,701	335,547
Men's shoes (exc. athletic), total	91,999	91,695	102,498
Dress & casual shoes	71,074	69,808	63,498
Dress & casual boots			14,365
Work shoes, anklet height or higher	20,565	21,536	24,243
Type not specified	360	351	392
Youths' & boys' shoes (exc. athletic)	11,648	12,132	14,343
Women's shoes (exc. athletic), total	143,554	145,920	145,436
Sandals	na	16,163	16,750
Casual shoes (exc. sandals)	na	60,580	59,020
Dress shoes	na	54,390	52,366
Boots, anklet height or higher	na	13,680	16,197
Type not specified	na	1,107	1,103
Misses' shoes (exc. athletic)	11,659	13,748	13,090
Children's shoes (exc. athletic)	13,282	13,899	16,162
Infants' & babies' shoes	22,107	22,801	23,166
Athletic shoes, total	24,676	20,529	20,852
By type:			
Designed for sports	na	6,200	6,709
Other (joggers, etc.), total	na	14,329	13,859
Up to size 3	na	1,843	2,740
Size 3 & over	na	12,486	11,119
Slippers, total	68,473	72,779	79,353
Men's, youths' & boys'	na	15,254	14,574
Women's & misses', total	na	52,383	57,641
Children's, infants' & babies'	na	4,485	6,422
Type not specified	na	657	716
Other footwear exc. with sole vulcanized to fabric upper or rubber/plastics & protective footwear	4,161	3,651	2,669
Shoes, type not specified	979	1,326	1,379
Shoes with sole vulcanized to fabric upper, total	71,955	78,130	79,278
Men's	na	25,125	26,846
Youths' & boys'	na	22,387	18,329
Women's & misses'	na	20,281	20,749
Children's & infants'	na	10,337	13,354
Rubber & plastic protective footwear, total	25,561	23,531	24,352
Rubber protective footwear, total	13,280	11,087	10,951
Boots	na	1,717	1,433

(continued)

U.S. Production of Footwear by Type, 1978-1980
(Thousands of Pairs)
(continued)

	1980(p)	1979(r)	1978(r)
Rubber & plastic protective footwear, total (continued)			
Arctics & gaiters	na	3,383	3,284
Light & heavy rubbers	na	2,361	2,642
Other rubber footwear, incl. lumberman & pacs	na	3,626	3,592
Plastic protective footwear, total	12,281	12,444	13,401

(p) = preliminary
(r) = revised
na = not available

Source: U.S. Bureau of the Census, Current Industrial Reports, Series MA-31A.

By Geographic Region

Footwear manufacturers in New England produced 104.0 million pairs, or 26.1% of the total 398.5 million pairs of nonrubber footwear produced in the U.S. in 1979. The North Central region accounted for 21.6% and the Middle Atlantic region 20.7%.

Maine was the leading state in nonrubber footwear production in 1979. Plants in this state accounted for 12.1% of total production, or 48.1 million pairs. Missouri plants produced 42.8 million pairs, 10.7% of the total.

Production of Nonrubber Footwear by Geographic Region, 1979

	Production (Thous. Pairs)	% of Total
Total	398,480	100.0%
New England Region	104,005	26.1
Maine	48,056	12.1
Massachusetts	31,146	7.8
Middle Atlantic Region	82,682	20.7
New Jersey	11,983	3.0
New York	33,298	8.4
Pennsylvania	37,401	9.4
North Central Region	85,974	21.6
Ohio	16,371	4.1
Illinois	7,195	1.8
Wisconsin	8,844	2.2
Missouri	42,769	10.7

(continued)

Production of Nonrubber Footwear by Geographic Region, 1979
(continued)

	Production (Thous. Pairs)	% of Total
South & West Regions	122,378	30.7%
Virginia	4,730	1.2
North Carolina	7,944	2.0
Tennessee	29,811	7.5
California	7,584	1.9
Geographic area, n.s.k.	3,441	0.9

n.s.k. = not specified by kind

Source: U.S. Bureau of the Census, Current Industrial Report, Footwear MA-31A.

Capacity Utilization

Despite the continued decline in the number of footwear producers, the industry has considerable unused productive capacity reported at 23.8% in 1980, by the U.S. International Trade Commission, versus 23.3% in 1978 and 28.7% in 1977.

These figures should be viewed against a general decline in apparent consumption and a slight increase in import market penetration, and the fact that most of the firms that have gone out of business have been smaller producers.

Percent Utilization of Capacity by Types of Nonrubber Footwear, 1975-1979

	1979	1978(r)	1977(r)	1976	1975
Total industry	76.6%	75.2%	76.0%	75.9%	69.1%
Men's shoes	73.5	78.2	80.3	83.5	74.1
Youths' & boys' shoes	73.6	63.5	53.6	82.2	55.7
Women's shoes	82.2	75.8	76.6	78.2	75.2
Misses' shoes	77.2	67.8	68.6	79.2	52.8
Children's shoes	60.5	60.2	68.2	78.1	72.4
Infants' & babies' shoes	78.4	71.6	70.1	76.9	78.3
Athletic shoes	81.2	82.5	79.9	83.0	70.0
Slippers	73.2	79.8	78.2	60.5	56.5
Other	71.0	57.8	80.9	42.0	66.9
Sub-total: shoes only	75.9	74.7	74.8	79.6	72.4
Effective capacity (million pairs)	520.3	556.8	550.5	556.5	598.2
Production (million pairs)	398.5	418.9	418.1	422.5	413.1

(r) = revised

Source: American Footwear Industries Association.

PRODUCTION

Materials & Construction

Some substitution of synthetic and cloth upper materials has occurred since 1977 because of high leather prices, particularly in 1979 and early 1980. Nevertheless, leather remains the predominant upper material. Nonrubber footwear produced with all- or part-leather uppers accounted for 51.0% of total production in the first half of 1980, down from 53.7% for calendar year 1979 and 55.6% for 1978. Leather could recover some lost ground if hide and skin prices are moderate and stable while prices for petroleum-derived synthetic materials increase.

In men's footwear (including dress and casual shoes and work boots), 82% by quantity is of leather, 13% vinyl or plastic, 5% other materials. About 52% of the content of women's shoes was leather in 1980, according to the Department of Commerce; 38% was vinyl or plastic; 10% other materials such as textiles and fibers.

Approximately 6% of slipper production is made of leather, 22% of vinyl or other plastic, and the balance other materials, primarily textiles.

The total value of all materials, supplies, etc., consumed in the nonrubber footwear industry was reported by the U.S. Census Bureau as follows, based on the 1977 Census of Manufactures.

Materials Consumed in the Nonrubber Footwear Industry, 1977
(Delivered Cost in Millions of Dollars)

	Men's Footwear, Exc. Athletic (SIC 3143*)	Women's Footwear, Exc. Athletic (SIC 3144*)	Footwear, Exc. Rubber, N.E.C. (SIC 3149*)	House Slippers (SIC 3142*)
Total materials consumed	$795.7	$553.5	$240.9	$ 83.3
Finished leather	431.5	183.2	84.6	4.8**
Cut stock & findings	137.2	108.5	42.4	2.1
Plastics	37.6	68.7	31.0	10.3
All other materials, containers & supplies	226.8	193.1	82.9	66.1

*For a definition of these SIC codes, see page 4.
**Delivered cost of soling leather is not included in this total.

Source. U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series MC77-I-31A.

SHIPMENTS

Nonrubber Footwear

Preliminary Bureau of the Census data places the value of nonrubber footwear shipments by all U.S. manufacturers at $4.5 billion in 1980, representing a rise of 6.2% compared with the 1979 total of $4.3 billion. An estimated 389.9 million pairs of nonrubber footwear were shipped in 1980, which was 3.2% below 1979 and which marked the fifth consecutive year that pairage shipments declined.

(continued)

SHIPMENTS

Nonrubber Footwear (continued)

Detailed data on footwear shipments by type will be reported by the Census Bureau for 1980 later this year. Estimates for major categories of nonrubber footwear as well as trends in shipments anticipated for 1981, as reported by the U.S. Bureau of Industrial Economics (1981 U.S. Industrial Outlook) are noted below. This source projects a 7% compound annual rate of increase in footwear industry shipments between 1980 and 1985, to reach $6.8 billion. This growth in current dollars is expected to include an increase in quantity of shipments of about 1%, compounded annually. The extent to which the failure of the Reagan administration to renew the Orderly Marketing Agreements will affect future industry shipments remains to be seen.

Estimated 1980 Shipments of Nonrubber Footwear by U.S. Manufacturers & Projected Rate of Growth, 1981/1980

	Estimated 1980		Projected Growth 1981/1980	
	Quantity (Mil. Prs.)	Value (Mil. $)	Quantity	Value
Nonrubber footwear, total	390	$4.5	+ 2.1%	+ 8.7%
Men's (except athletic)	86	1.9	+ 2.3	+ 9.5
Women's (except athletic)	144	1.8	+ 2.1	+ 8.3
Houseslippers	70	.27	+ 1.4	+ 7.5
Other, including athletic	90	.65	+ 2.2	+ 7.9

Source: U.S. Bureau of Industrial Economics, 1981 U.S. Industrial Outlook.

Detailed information on footwear shipments in 1979 has been compiled by the U.S. Bureau of the Census, based on a sample survey of manufacturers. The total value of U.S. shipments of all types of footwear was $4.7 billion, up 12.8% compared with the 1978 value of $4.2 billion. Pairage slipped 1.4% in 1979, with 510.4 million pairs shipped compared to 517.7 million in 1978.

Nonrubber footwear shipments rose 12.3% in value to $4.3 billion despite a 2.5% drop in the number of pairs shipped. Three nonrubber footwear categories did manage to increase shipments pairage in 1979. Women's shoes, which acccounted for 36.3% of the total quantity and 38.5% of the total value of shipments in 1979, increased 1.2% in pairage to 146.2 million and 12.8% in value to $1.6 billion. Misses' shoes gained 8.5% in pairage and 11.1% in value. Athletic footwear rose 18.1% in value to $185 million and 1.0% in pairage to 21.1 million. Although the number of pairs of men's shoes shipped by U.S. manufacturers fell 5.4% in 1979 to 92.1 million, their value was 11.5% higher than in 1978.

Rubber/Plastics Footwear

U.S. producers' shipments of rubber/plastics footwear decreased in each year during 1975-1978, from 149.7 million pairs, valued at $459.6 million in 1975 to 104.8 million pairs, valued at $407 million in 1978, then increased slightly in 1979 to 107.8 million pairs, valued at $480.2 million. Footwear with fabric uppers and soles of rubber or plastics represented about 77% of the total. Shipments of this type declined from 132.9 million pairs in 1975 to 83.2 million pairs in 1979.

Producers' shipments of protective footwear increased annually since 1975, from 16.8 million pairs, valued at $90.7 million to 24.6 million pairs, valued at $161.2 million in 1979. About half of domestic shipments consists of boots, arctics and gaiters.

Quantity & Value of Footwear Shipments by U.S. Manufacturers, 1977-1979

(Quantity in millions of pairs; value in millions of dollars)

	Quantity			Value			Avg. Value
	1979(r)	1978(r)	% Change 1979/1978	1979(r)	1978(r)	% Change 1979/1978	Per Pair 1979
Total shipments, all types of footwear	510.4	517.7	- 1.4%	$4,746.2	$4,206.3	+12.8%	$ 9.30
Nonrubber shoes & slippers	402.6	412.9	- 2.5	4,266.0	3,799.3	+12.3	10.60
Men's shoes (exc. athletic)	92.1	97.4	- 5.4	1,773.5	1,590.0	+11.5	19.26
Dress & casual shoes	59.5	59.6	- 0.2	1,007.5	870.1	+15.8	16.93
Boots, dress & casual	12.2	13.7	-11.0	344.0	289.4	+18.9	28.07
Work shoes, ankle ht. or higher	20.0	23.8	-16.0	416.4	425.1	- 2.1	20.80
Shoes, type not specified	0.3	0.4	-25.0	5.6	5.4	+ 3.7	18.67
Youths' & boys' (exc. athletic)	12.3	15.2	-19.1	98.8	103.0	- 4.1	8.00
Women's shoes (exc. athletic)	146.2	144.5	+ 1.2	1,646.9	1,459.4	+12.8	11.26
Sandals	16.0	16.4	- 2.4	174.4	134.4	+29.8	10.90
Casual, exc. sandals	59.3	59.6	- 0.5	579.8	527.8	+ 9.8	9.78
Dress	54.5	51.5	+ 5.8	604.2	543.6	+11.1	11.09
Boots, ankle ht. or higher	15.2	15.9	- 4.4	276.1	242.8	+13.7	18.16
Shoes, type not specified	1.1	1.1	--	12.4	10.8	+14.8	11.27
Misses' shoes (exc. athletic)	14.0	12.9	+ 8.5	86.9	78.2	+11.1	6.21
Children's shoes (exc. athletic)	14.2	15.8	-10.1	98.2	98.3	- 0.1	6.92
Infants'/babies' shoes	24.0	23.0	+ 4.3	97.5	93.1	+ 4.7	4.07
Athletic shoes, total	21.1	20.9	+ 1.0	185.0	156.7	+18.1	8.78
Slippers, total	73.6	79.0	- 6.8	245.0	194.8	+25.8	3.33
Men's, youths', boys'	13.6	14.4	- 5.6	45.5	39.9	+14.0	3.35
Women's, misses'	54.0	57.4	- 5.9	184.0	144.1	+27.7	3.41
Children's, infants', babies'	5.3	6.4	-17.2	13.2	8.9	+48.3	2.49
Type not specified	0.7	0.7	--	2.2	1.8	+22.2	3.14
All other shoes & slippers	3.8	2.8	+35.7	25.6	17.7	+44.6	6.74
Shoes, exc. men's & women's, type not specified	1.3	1.3	--	8.5	8.1	+ 4.9	6.54

(continued)

Quantity & Value of Footwear Shipments by U.S. Manufacturers, 1977-1979

(Quantity in millions of pairs; value in millions of dollars)

	Quantity			Value			Avg. Value
	1979(r)	1978(r)	% Change 1979/1978	1979(r)	1978(r)	% Change 1979/1978	Per Pair 1979
Shoes with sole vulcanized to fabric upper, total*	83.2	81.6	+ 2.0%	$319.0	$286.6	+11.3%	$ 3.83
Men's	28.4	27.2	+ 4.4	133.6	114.3	+16.9	4.70
Youths', boys'	20.1	18.8	+ 6.9	71.1	62.9	+13.0	3.54
Women's, misses'	22.7	22.2	+ 2.2	86.6	81.0	+ 6.9	3.81
Children's, infants', babies'	12.0	13.4	-10.5	27.7	28.4	- 2.5	2.31
Rubber & plastic protective footwear	24.6	23.2	+ 6.0	161.2	120.4	+33.9	6.55
Rubber protective footwear, total**	10.1	10.3	- 1.9	81.6	65.9	+23.8	8.08
Boots	1.8	1.5	+20.0	23.3	17.9	+30.2	12.94
Arctics & gaiters	3.1	3.3	+ 6.1	22.2	16.7	+32.9	7.16
Light/heavy rubbers	2.3	2.5	- 8.0	10.5	9.0	+16.7	4.56
Plastic protective footwear, total	14.5	12.8	+13.3	79.5	54.4	+46.1	5.48

*Data may contain some imported shoes.
**Includes types not separately listed.
(r) = revised
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear, MA-31A.

SHIPMENTS

Value of Shipments by All Producers of Specified Types of Footwear
By Leading States, 1972, 1977

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Men's dress & casual shoes, exc. athletic, total	$872.5	$714.0*	+ 22.2%
New England Division:			
Maine	100.5		
New Hampshire	42.5		
Massachusetts	62.6		
Middle Atlantic Division:			
Pennsylvania	104.6		
East North Central Division:			
Wisconsin	100.0		
West South Central Division:			
Arkansas	36.6		
Men's dress & casual boots, except work, total	271.0	154.1	+ 75.9
New England Division:			
Maine	12.0	nr	
Massachusetts	28.9	12.6	+129.4
Middle Atlantic Division:			
Pennsylvania	15.7	nr	
East South Central Division:			
Tennessee	90.1	nr	
West South Central Division:			
Texas	56.1	nr	
Men's work shoes & boots, total	421.7	309.5	+ 36.2
New England Division:			
Maine	41.3	25.0	+ 65.2
New Hampshire	16.8	nr	
Massachusetts	33.0	24.7	+ 33.6
East North Central Division:			
Wisconsin	52.0	32.0	+ 62.5
South Atlantic Division:			
North Carolina	30.2	nr	
Women's dress shoes, total	480.6	**	
New England Division:			
Maine	41.7		
New Hampshire	52.9		
Massachusetts	44.7		
Middle Atlantic Division:			
New York	25.1		
Pennsylvania	17.9		
West North Central Division:			
Missouri	63.5		
Pacific Division:			
California	28.9		

(continued)

Value of Shipments by All Producers of Specified Types of Footwear
By Leading States, 1972, 1977
(continued)

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Women's casual shoes, exc. sandals, total	$524.6	**	
New England Division:			
Maine	105.2		
New Hampshire	28.8		
Massachusetts	44.0		
Middle Atlantic Division:			
New York	12.3		
Pennsylvania	48.6		
West North Central Division:			
Missouri	98.8		
West South Central Division:			
Arkansas	43.7		
Women's boots, ankle height or higher, total	232.2	$102.6	+126.3%
New England Division:			
Maine	26.4	nr	
New Hampshire	44.1	19.3	+128.5
Massachusetts	23.7	5.6	+323.2
Middle Atlantic Division:			
Pennsylvania	18.7	10.6	+ 76.4
East South Central Division:			
Tennessee	38.2	nr	
Pacific Division:			
California	16.7	2.9	+475.9
Women's sandals, total	102.8	**	
New England Division:			
New Hampshire	6.8		
Middle Atlantic Division:			
New York	9.6		
Pennsylvania	15.3		
West North Central Division:			
Missouri	8.5		
Pacific Division:			
California	31.1		

nr = not reported
* 1972 shipment value by geographic area not available.
** 1972 shipment value not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-I-31A.

SHIPMENTS

By Price Line

Percentage Distribution of Selected Types of Footwear Shipments by Price Range (Wholesale Price Per Pair) 1978-1980

	U.S. Producers			U.S. Importers		
	1980	1979	1978	1980	1979	1978
Leather footwear						
Men's dress & casual footwear	100%	100%	100%	100%	100%	100%
$10.00 and under	21	21	21	65	57	71
$10.01 to $14.00	18	19	24	16	16	15
$14.01 to $18.00	16	17	25	7	6	4
$18.00 to $28.00	28	29	21	8	10	7
Over $28.00	17	14	9	4	6	3
Men's boots, exc. work boots	100%	100%	100%	100%	100%	100%
$14.00 and under	13	13	14	30	54	93
$14.01 to $18.00	6	6	27	37	25	4
$18.01 to $28.00	47	43	45	27	15	3
Over $28.00	44	48	14	6	6	1
Men's work boots	100%	100%	100%	100%	100%	100%
$18.00 and under	10	11	16	94	88	92
$18.01 to $22.00	32	29	42	4	10	4
$22.01 to $28.00	28	33	28	2	1	2
Over $28.00	30	27	14	-	1	2
Athletic footwear, all types	100%	100%	100%	100%	100%	100%
$7.00 and under	45	31	39	37	28	47
$7.01 to $10.00	14	33	39	31	46	32
Over $10.00	41	36	22	32	25	21
Women's dress & casual footwear	100%	100%	100%	100%	100%	100%
$10.00 and under	18	25	34	62	61	65
$10.01 to $16.00	43	43	57	28	27	31
Over $16.00	39	32	32	10	12	4
Women's sandals	100%	100%	100%	100%	100%	100%
$7.00 and under	15	21	15	55	54	47
$7.01 to $10.00	27	40	42	16	18	24
$10.01 to $13.00	13	13	21	19	11	12
Over $13.00	45	26	22	10	17	16
Women's boots	100%	100%	100%	100%	100%	100%
$16.00 and under	23	8	19	60	39	26
$16.01 to $22.00	14	31	27	14	18	43
$22.01 to $28.00	13	34	38	16	31	23
Over $28.00	50	27	16	10	12	8

(continued)

SHIPMENTS

By Price Line

Percentage Distribution of Selected Types of Footwear Shipments by Price Range (Wholesale Price Per Pair) 1978-1980
(continued)

	U.S. Producers			U.S. Importers		
	1980	1979	1978	1980	1979	1978
Rubber/plastics footwear						
Men's dress & casual footwear	100%	100%	100%	100%	100%	100%
$7.00 and under	27	28	35	94	88	92
Over $7.00	73	72	65	6	12	8
Women's dress & casual footwear	100%	100%	100%	100%	100%	100%
$7.00 and under	18	22	30	83	68	86
Over $7.00	82	78	70	17	32	14

NOTE: Compiled from data submitted in response to questionnaires of the USITC. The data reported for 1978 and 1979 represent approximately 51% of total U.S. shipments and 58% of U.S. importers' shipments. Data reported for 1980 represent approximately 54% of total U.S. shipments and 58% of U.S. importers' shipments.

Source: Selected from U.S. International Trade Commission Publications 1139, Nonrubber Footwear, April 1981.

Seasonal Pattern

Percent of Year's Total Shipments of Footwear by Months, 1978-1980
(Based on Pairage Shipped by U.S. Manufacturers)

	Nonrubber Footwear			Footwear With Sole Vulcanized to Fabric Upper*	Rubber & Plastic Protective Footwear*
	1980	1979	1978	1979(r)	1979(r)
Year	100.0%	100.0%	100.0%	100.0%	100.0%
January	8.6	8.8	7.7	9.4	9.4
February	8.6	8.5	7.8	9.8	9.2
March	8.7	9.2	9.3	10.8	10.0
April	8.4	8.3	7.7	9.0	8.2
May	8.4	9.1	8.7	9.5	8.9
June	8.3	8.0	9.0	9.1	8.5
July	7.2	6.7	7.4	6.7	6.4
August	8.4	8.8	9.9	7.0	5.8
September	9.1	8.4	8.7	7.0	7.9
October	9.6	9.3	8.7	7.1	8.9
November	7.5	8.0	8.1	7.1	9.2
December	7.3	7.0	6.9	7.4	7.7

*Data for 1978 and 1980 not available. Data for 1979 represents production.
(r) = revised

Source: Based on reports of U.S. Bureau of the Census, Current Industrial Reports, M31A.

SHIPMENTS

By Class of Customers

Distribution of Sales of Shoes & Slippers by Class of Customer, 1979
(Not Including Rubber/Plastic Footwear)

	Type of Footwear				
	Men's Shoes, Exc.Athletic	Women's Shoes, Exc.Athletic	Athletic Footwear	All Other Footwear	Slippers
Total shipments	100.0%	100.0%	100.0%	100.0%	100.0%
Retail stores & outlets of this company	23.8	18.7	30.7	23.2	5.3
Independent retailers	30.0	35.4	13.3	30.6	22.5
All other retailers	34.5	34.8	23.6	27.8	60.1
Wholesalers	7.9	8.7	31.8	17.6	9.8
All others, incl. govt. and for exports	3.7	2.4	0.5	0.9	2.2
Total sales (mil. $)	$1,773.5	$1,646.9	$185.0	$415.6	$245.0

Source: U.S. Bureau of the Census, Current Industrial Reports, Series MA-31A.

FACTORY PRICES

In the first six months of 1980, the average factory shipping price of shoes was $11.87, an increase of 16.9% from the comparable period of 1979. The estimated average price for all of 1980 was $12.03 a pair, up 13.5% from 1979.

After rising 19.1% in 1979 compared to 1978, producer (or factory) prices of nonrubber footwear increased at a 7.0% rate in 1980. Leather prices, which had risen 49.5% in 1979, declined 12.6% while hides and skins prices, up 48.9% in 1979 due to shortages, dropped 30.9%. These reductions were largely responsible for the stabilization of footwear prices in 1980. Industry sources do not expect another drastic rise in leather prices in the foreseeable future. Rubber footwear, which had increased 7.8% in 1979, rose 3.7% at the factory price level in 1980.

Producer prices of nonrubber footwear rose at an average annual rate of 8.7% between 1974 and 1980, approximately the same as prices for all commodities, according to an International Trade Commission analysis of Bureau of Labor Statistics data. Over the same period, producer prices of imported footwear rose 10.4% annually.

Factory prices of men's and boys' footwear averaged a 9.5% annual gain during the six-year span. Women's and misses' footwear and children's and infants' footwear rose at average annual rates of 8.4% and 5.8%, respectively.

FACTORY PRICES

Footwear Producer (Factory) Price Index, 1978-1980
(1967 = 100)

	Annual Averages			% Change	Monthly Averages July	
	1980	1979	1978	1980/1979	1981	1980
All commodities	268.4	235.5	209.3	+14.0%	296.0	270.4
Hides & skins	370.9	536.7	360.5	-30.9	na	356.6
Cattle hides	366.8	593.8	390.1	-38.2	355.1	348.3
All leather	311.6	356.7	238.6	-12.6	317.4	292.2
Cattle hide leather	315.1	359.2	230.8	-12.3	319.8	294.6
Nonrubber footwear	233.3	218.0	183.0	+ 7.0	241.9	232.7
Men's & boys' footwear	261.5	250.2	207.5	+ 4.5	276.1	259.5
Women's & misses' footwear	217.1	198.5	167.4	+ 9.4	221.5	217.9
Children's & infants' footwear	192.9	178.1	160.6	+ 8.3	199.2	191.0
Rubber footwear	211.9	204.4	189.6	+ 3.7	220.1	216.6

Source: Bureau of Labor Statistics.

Reflecting the downturn in leather prices, gains in footwear prices continued to moderate in 1981. For the January to July period, the Producer Price Index for nonrubber footwear reached 241.9, up 3.9% compared with the same 1980 period.

FOREIGN TRADE

Imports

In 1980 both U.S. production and footwear imports declined from 1979 levels. Imports of nonrubber footwear accounted for 48.9% of the total U.S. market supply last year, compared with 51% in 1979, according to the American Footwear Industries Association. Of the total U.S. market supply of rubber/fabric footwear, imports accounted for 62.8% in 1980, 58.8% in 1979.

Combining the totals for both types of footwear, penetration of the total U.S. market by imported footwear amounted to 51.8% in 1980, down from 52.5% in 1979. Import penetration was heaviest in athletic footwear. Despite a healthy increase in domestic production last year, imports garnered 68.2% of the market—up from 66.3% in 1979—due to a record breaking level of imports.

Imports (continued)

Import penetration in various segments of the nonrubber footwear market has been reported by the AFIA as follows:

Import Penetration of U.S. Nonrubber Footwear Market by Type of Footwear
(Imports as % of Total U.S. Supply)

	1980	1979
Men's	38.5	39.9
Youths' & boys'	39.7	37.6
Women's	58.9	63.8
Misses'	54.7	46.3
Children's	47.0	47.9
Infants'	31.4	30.3
Athletic	68.2	65.3
Slippers*, plastic one-piece sandals, etc.	5.4	4.9

*The import penetration of slippers is estimated to be understated by about 75%.

Source: American Footwear Industries Association based on U.S. Bureau of the Census data.

The Orderly Marketing Agreements with Taiwan and Korea, instituted in 1977, expired in June 1981 and were not renewed. Nonrubber footwear imports for the first four months of 1981, when the OMA's were still in effect, were up 3% over the same period in 1980, while their value increased 2.2%. Imports from the People's Republic of China in this period exceeded their entire 1980 total and were 197% higher than in the first four months of 1980. Nonrubber footwear imports from Taiwan and Korea decreased 6% in quantity.

In the last full year of the OMA's (1980), nonrubber footwear imports from Taiwan and Korea amounted to 181 million pairs, nearly 50% of total imports of this type, but down from 61% prior to the introduction of the quotas. This quantity represented almost 25% of the total nonrubber footwear market supply in the U.S. in 1980. With the elimination of the OMA's, the U.S. government expressed its belief in the ability of the domestic footwear industry to compete with imports and the expectation that the move should lead to lower retail prices on footwear.

In the rubber and plastics footwear industry, imports constituted approximately 63% of the U.S. market in 1980. Starting in July 1981, imports of footwear with fabric uppers and rubber or plastic soles (mostly athletic footwear, but also slippers and other types) will be subject to higher import duties.

Imports of protective footwear fell to a 34% share of the total market in 1979 from 38% in 1978, according to the Department of Commerce.

U.S. Footwear Imports by Type, 1979, 1980

	1980					1979		% Change 1980/1979	
	Pairs (Mil.)	% of Total	Value (Mil.$)	% of Total	Avg. Value Per Pair	Pairs (Mil.)	Value (Mil.$)	Pairs	Value
Footwear, total	510.5	100.0%	$2,925.3	100.0%	$ 5.73	545.2	$2,872.0	- 6.4%	+ 1.8%
Nonrubber footwear, total	326.3	63.9	2,095.5	71.6	6.42	369.3	2,263.0	-11.6	- 7.4
Rubber/plastics footwear, total	184.2	36.1	329.8	28.4	4.50	175.9	609.0	+ 4.7	+ 36.2
Men's & boys', total	146.6	28.7	1,112.5	38.0	7.59	131.8	920.8	+11.2	+ 20.8
Women's & misses', total	265.4	52.0	1,470.9	50.3	5.54	303.8	1,591.1	-12.7	- 7.6
Children's & infants', total	36.8	7.2	107.2	3.7	2.91	37.2	94.5	- 1.0	+ 13.4
Type not specified, total	61.7	12.1	234.7	8.0	3.80	72.3	265.6	-14.7	- 11.6
Dress & casual footwear, total	226.4	44.4	1,512.5	51.7	6.68	265.1	1,721.8	-14.6	- 12.1
Leather uppers, total (N)	99.3	19.5	1,026.1	35.1	10.33	133.8	1,272.6	-25.8	- 19.4
Men's & boys'	25.1	4.9	323.1	11.0	12.88	31.8	382.6	-21.2	- 15.3
Women's & children's	73.3	14.4	690.2	23.6	9.41	101.3	881.2	-27.6	- 21.7
Other, not specified	0.9	0.2	12.9	0.4	13.65	0.7	8.8	+36.4	+ 45.9
Lined vinyl uppers, total (N)	127.1	24.9	486.4	16.6	3.83	131.3	449.1	- 3.2	+ 8.3
Men's & boys'	21.8	4.3	93.4	3.2	4.28	16.5	61.2	+31.8	+ 52.7
Women's & misses'	95.6	18.7	363.9	12.4	3.81	105.1	363.8	- 9.0	+ 0.05
Children's & infants'	9.7	1.9	29.0	1.0	3.00	9.7	24.2	- 0.2	+ 20.0
Athletic, total	175.3	33.9	1,052.5	36.0	6.07	151.4	746.2	+14.5	+ 41.1
Leather uppers, total (N)	45.6	8.9	373.9	12.8	8.20	33.6	258.1	+35.6	+ 44.9
Men's & boys'	36.7	7.2	312.4	10.7	8.51	27.0	212.1	+35.6	+ 47.3
Women's & children's	8.6	1.7	56.5	1.9	6.59	5.6	34.8	+52.7	+ 62.3
Ski boots	0.3	0.06	4.9	0.2	15.31	0.9	11.1	-66.1	- 55.6
Fabric uppers, total (R)	119.7	23.4	606.3	20.7	5.07	111.2	415.3	+ 7.6	+ 46.0
Men's & boys'	44.9	8.8	314.2	10.7	7.00	38.8	200.4	+15.7	+ 56.8
Women's & misses'	38.3	7.5	171.5	5.9	4.47	35.2	112.3	+ 8.9	+ 52.7
Children's & infants'	13.6	2.7	43.7	1.5	3.22	14.7	41.1	- 7.7	+ 6.3
Others, not oxford height	22.9	4.5	76.9	2.6	3.35	22.5	61.5	+ 1.8	+ 24.9
Lined vinyl uppers, total (R)	8.0	1.6	72.4	2.5	9.01	6.6	72.8	+21.6	- 0.6
Men's & boys'	4.0	0.8	18.5	0.6	4.65	3.1	12.9	+29.3	+ 42.8
Women's & misses'	2.4	0.5	9.5	0.3	3.89	1.4	5.1	+72.1	+ 86.7
Children's & infants'	0.5	0.1	1.5	0.05	2.99	0.5	1.1	+ 6.5	+ 30.5
Ski boots	1.0	0.2	42.8	1.5	38.94	1.7	53.6	-35.9	- 20.1

(continued)

U.S. Footwear Imports by Type, 1979, 1980 (continued)

	1980					1979		% Change 1980/1979	
	Pairs (Mil.)	% of Total	Value (Mil.$)	% of Total	Avg. Value Per Pair	Pairs (Mil.)	Value (Mil.$)	Pairs	Value
Work footwear, leather, total (N)	4.7	0.9%	$ 55.2	1.9%	$ 11.65	5.6	$ 57.8	-16.2%	- 4.6%
Boots & protective footwear, non-leather, total (R)	7.3	1.4	31.1	1.1	4.28	12.1	41.4	-39.9	- 25.0
Other footwear, total	98.7	19.3	274.0	9.4	2.77	110.9	304.7	-11.0	- 10.1
Unsupported rubber or plastic, total (N)	28.5	5.6	112.7	3.8	3.96	22.4	71.2	+27.0	+ 58.3
Men's & boys'	3.5	0.7	15.8	0.5	4.55	2.7	7.0	+29.3	+125.0
Women's & misses'	23.0	4.5	91.8	3.1	3.98	18.1	61.2	+27.4	+ 50.0
Children's & infants'	1.9	0.4	5.0	0.2	2.61	1.6	3.0	+18.7	+ 70.7
Zori (R)	20.7	4.1	7.3	0.2	0.35	23.7	8.2	-12.3	- 10.7
Fiber uppers (N)	14.1	2.8	35.9	1.2	2.55	17.2	38.6	-18.0	- 6.8
Wood (N)	11.9	2.3	70.3	2.4	5.91	20.6	119.3	-42.3	- 41.1
Other (N)	23.5	4.6	47.8	1.6	2.03	27.1	67.5	-12.9	- 29.2

(N) = Nonrubber
(R) = Rubber
*The import value is the wholesale value at the first port of entry in the U.S. It includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise to the U.S.

NOTE: The amount of rubber and nonrubber footwear listed here differs from the amount stated by the Department of Commerce due to classification and definitional differences.

Source: Fairchild Market Research Department
based on Department of Commerce data.

FOREIGN TRADE

Imports

U.S. imports of nonrubber footwear came principally from the seven countries named in the table below. These countries accounted for 85% of the total quantity and 81% of the total value of nonrubber footwear imports.

The decline in the number of imports from Italy is attributed to the decreased popularity of a particular style of women's shoe, a one-piece molded plastic bottom shoe with uppers of leather or various other materials.

Leading Countries of Origin of Nonrubber Footwear, 1979, 1980

	Quantity (Mil. Pairs)		% Change	Value (Mil.$)		% Change	Avg. Value Per Pair	
	1980	1979	1980/1979	1980	1979	1980/1979	1980	1979
Nonrubber footwear:								
Taiwan	144.0	124.9	+ 15.3%	$620.1	$436.1	+42.2%	$ 4.31	$ 3.49
Italy	46.2	97.1	- 52.4	506.5	787.5	-35.7	10.96	8.11
Korea	37.0	24.4	+ 51.6	262.8	166.6	+57.7	7.09	6.83
Brazil	31.3	32.0	- 2.2	239.6	237.2	+ 1.0	7.65	7.41
Hong Kong	20.8	22.1	- 5.9	36.1	36.9	- 2.2	1.74	1.67
Spain	18.0	27.3	- 34.1	173.7	274.6	-36.7	9.64	10.06
Philippines	14.3	13.2	+ 8.3	34.1	34.8	- 2.0	2.39	2.63

Source: U.S. International Trade Commission, Nonrubber Footwear, Publ. No. 1139, April 1981, based on U.S. Department of Commerce data.

FOREIGN TRADE

Imports

Leading Countries of Origin of Rubber Footwear & Footwear With Fabric Uppers & Soles of Rubber/Plastic, 1978, 1979

	Quantity (Mil. Pairs)		% Change	Value (Mil.$)		% Change	Avg. Value Per Pair	
	1979	1978	1979/1978	1979	1978	1979/1978	1979	1978
Rubber footwear:								
Taiwan	67.4	112.5	- 40.1	$153.1	$211.2	- 27.5%	$2.27	$1.88
Korea	51.8	70.7	- 26.7	251.2	300.5	- 16.4	4.85	4.25
Hong Kong	11.4	14.1	- 19.1	6.2	6.7	- 7.5	0.54	0.48
Footwear with fabric uppers & soles of rubber/plastic*:								
Taiwan	53.9	94.8	- 43.1	146.3	202.7	- 27.8	2.72	2.14
Korea	41.9	59.5	- 29.6	213.8	265.8	- 19.6	5.11	4.47
Mainland China	6.4	2.9	+120.7	11.4	2.4	+375.0	1.79	0.86

*The totals for this category are included in the "rubber footwear" classification above.

Source: U.S. International Trade Commission, Summary of Trade and Tariff Information Pub. No. 841, March 1981, based on U.S. Department of Commerce data.

Exports

The value of U.S. exports of all types of footwear rose 57.4% in 1980 to $130.8 million, compared to $83.1 million in 1979. The quantity exported increased to 15.3 million pairs from 11.1 million in 1979, a 37.6% gain. U.S. exports of nonrubber footwear in 1980 were valued at $112.0 million, a 58.9% rise over the 1979 value of $70.5 million. In quantity, nonrubber footwear exports were up 40.3% in 1980 to 13.0 million pairs. The value of nonrubber footwear exports represented 2.6% of domestic shipment value and 3.4% of domestic production.

Since 1977, when the U.S. footwear industry began an aggressive marketing program in conjunction with the Department of Commerce to promote exports, nonrubber footwear exports have jumped 220.0% in value and 141.0% in pairage.

FOREIGN TRADE

Exports

Quantity & Value of Footwear Exports, 1979, 1980

	Quantity (Thous. Pairs)			Value* ($ Thous.)		
	1980	1979	% Change 1980/1979	1980	1979	% Change 1980/1979
Total, reported categories	15,345.5	11,150.4	+ 37.6%	$130,767	$ 83,091	+ 57.4%
Footwear of leather uppers, nspf, total	3,587.3	3,273.6	+ 9.6	47,536	32,875	+ 44.6
Men's	1,731.1	1,794.4	- 3.5	31,176	23,267	+ 34.0
Women's	1,377.2	1,052.4	+ 30.9	13,112	7,419	- 76.7
Misses', children's & infants'	359.4	299.9	+ 19.8	2,547	1,403	+ 81.5
Youths' & boys'	119.6	126.9	- 5.7	701	786	- 10.8
Athletic footwear, total	3,979.0	2,390.1	+ 66.5	33,527	22,073	+ 51.9
Leather uppers	790.9	709.1	+ 7.3	12,246	7,787	+ 57.3
Athletic footwear, nspf	3,218.1	1,681.0	+ 91.4	21,281	14,286	+ 49.0
Protective footwear of rubber or plastic, total	654.3	670.0	- 2.3	5,856	4,275	+ 37.0
Footwear with textile uppers & rubber or plastic outer soles, total	1,692.6	1,218.4	+ 38.9	12,907	8,338	+ 54.8
Slippers, total	798.3	758.7	+ 5.2	3,750	2,227	+ 68.4
Leather uppers	198.1	413.8	- 52.1	1,624	1,279	+ 27.0
Slippers, nspf	600.2	344.9	+ 74.0	2,126	948	+124.3
Footwear, nspf, total	4,634.0	2,839.6	+ 63.2	27,191	13,303	+104.4
Men's	1,825.1	786.3	+137.5	12,332	5,300	+132.7
Women's	1,982.5	1,183.0	+ 67.6	11,407	5,506	+107.2
Misses', children's & infants'	580.8	734.6	- 20.9	2,477	1,870	+ 32.5
Youths' & boys'	245.6	153.7	+ 59.8	975	627	+ 55.5

*This value represents the export value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance and other charges or transportation cost beyond the port of exportation.

nspf = not specially provided for.

Source: U.S. Department of Commerce, U.S. General Exports FT 410, December 1980, 1979.

FOREIGN TRADE

Exports

Argentina replaced Canada in 1980 as the major market for U.S.-produced nonrubber footwear. Exports to Argentina increased 361.2% to 2.5 million pairs. Athletic footwear accounted for approximately 80% of the total. Because of restrictions on the importation of footwear imposed by the Canadian government, U.S. footwear exports to Canada declined 28.2% in 1980, although their value increased 16.8% over 1979. Nonrubber footwear exports to North, South and Central American countries represented 47% of the value and 68% of the quantity of total exports of nonrubber footwear from the U.S.

Leading Countries of Importation of U.S.-Made Nonrubber Footwear, 1979, 1980

	Quantity (Thous. Pairs)		% Change	Value (Thous. $)		% Change	Avg. Value Per Pair	
	1980	1979	1980/1979	1980	1979	1980/1979	1980	1979
Nonrubber footwear, total	12,999	9,262	+ 40.3%	$112,003	$70,478	+ 58.9%	$ 8.62	$ 7.61
Argentina	2,532	549	+361.2	10,702	2,440	+338.6	4.23	4.44
Canada	1,435	2,000	- 28.2	12,151	10,400	+ 16.8	8.47	5.20
Mexico	1,031	598	+ 72.4	5,922	3,255	+ 81.9	5.74	5.44
Japan	546	496	+ 10.1	12,443	7,808	+ 59.4	22.78	15.74
France	533	232	+129.7	7,341	2,918	+151.6	13.77	12.58

Source: U.S. International Trade Commission, Nonrubber Footwear Pub. No. 1139, April 1981, based on U.S. Department of Commerce data.

MARKET SUPPLY

Summary of the Total Market Supply of Footwear in the U.S., 1978-1980

	Quantity (Mil. Pairs)			Value (Mil. $)		
	1980(p)	1979	1978	1980(p)	1979	1978
Footwear, total						
Domestic shipments*	487.1	510.4	517.7	$ na	$4,746.2	$4,196.3
U.S. exports	15.3	11.2	8.1	130.8	83.1	51.6
Shipments to Puerto Rico	7.7	8.4	6.7	38.5	44.7	42.1
U.S. imports	510.5	545.2	589.6	2,925.3	2,872.0	2,638.2
Shipments from Puerto Rico	22.8	18.5	17.7	172.0	116.4	94.5
Market supply	997.4	1,054.5	1,110.2	na	7,606.8	6,835.3
Nonrubber footwear, total						
Domestic shipments	389.6	402.6	412.9	4,532.4	4,266.0	3,789.3
U.S. exports	13.0	9.3	6.9	112.0	70.5	45.3
Shipments to Puerto Rico	6.6	7.2	5.9	35.0	41.3	39.2
U.S. imports	326.3	369.3	344.2	2,095.5	2,263.0	1,927.7
Shipments from Puerto Rico	19.6	16.2	16.7	153.2	104.1	90.0
Market supply	715.9	771.6	761.0	6,634.1	6,521.3	5,722.5
Rubber/plastics footwear, total (incl. sole vulcanized to fabric upper footwear)						
Domestic shipments**	97.5	107.8	104.8	na	480.2	407.0
U.S. exports	2.3	1.9	1.2	18.8	12.6	6.3
Shipments to Puerto Rico	1.1	1.2	0.8	3.5	3.4	2.9
U.S. imports	184.2	175.9	245.4	829.8	609.0	710.5
Shipments from Puerto Rico	3.2	2.3	1.0	18.8	12.3	4.5
Market supply	281.5	282.9	349.2	na	1,085.5	1,112.8

*Includes domestic production of rubber/plastics footwear in 1980 only.
**For 1980, figure represents domestic production rather than shipments.
(p) = preliminary.

Source: Fairchild Market Research Department based upon U.S. Department of Commerce data.

MARKET SUPPLY

Nonrubber Footwear Supply Per Capita, 1971, 1975-1980

Year	Millions of Pairs U.S. Shipments	Exports	Imports	Market Supply (Mil. of Pairs)	Resident Population (Mil.)	Per Capita Consumption (No. of Pairs)
1971	552.1	2.1	286.6	818.6*	205.1	4.0
1975	419.2	4.6	287.8	702.4*	212.2	3.3
1976	424.9	6.0	370.0	788.9*	214.0	3.7
1977	430.9	5.4	368.1	793.6*	215.6	3.7
1978	412.9	6.9	373.5	790.3	217.4	3.6
1979	402.6	9.3	404.6	806.9	219.2	3.7
1980	389.6	13.0	365.7	755.3	221.2	3.4

*Does not include shipments between the U.S. and Puerto Rico.

Source: Fairchild Market Research Department based on Department of Commerce data.

RETAIL TRADE

The Retail Market

The fastest growing segment of the U.S. population is to be found in the age group 35 to 59 years of age, particularly those age 35 to 44. By the year 2000 there will be an increase of over 50% in the number of adults 35 to 59 and they will represent better than one out of three in the total population.

Next in terms of percentage gain is the 60-and-over group, which will show an increase of about 18% by the year 2000. They will still be outnumbered by men and women in the 20 to 34 age group, however, although this age group and the population in the 15 to 19 category will decline in number by the year 2000 compared with 1980.

U.S. Population by Sex & Age, 1980 & Projections for 1985, 2000*

	Number (Thous.) 1980	1985	2000	% Change 2000/1980	% of Total 1980	1985	2000
U.S. total	226,506	232,880	260,378	+14.9%			
Male, total	110,032	113,366	126,588	+15.0	100.0%	100.0%	100.0%
Under 5 yrs.	8,360	9,632	9,153	+ 9.5	7.6	8.5	7.2
5 to 9 yrs.	8,537	8,324	9,738	+14.1	7.8	7.3	7.7
10 to 14 yrs.	9,315	8,471	10,329	+10.9	8.5	7.5	8.2
15 to 19 yrs.	10,752	9,150	10,069	- 6.3	9.8	8.1	8.0
20 to 34 yrs.	29,039	30,142	25,662	-11.6	26.4	26.6	20.3
35 to 59 yrs.	29,057	31,650	44,115	+51.8	26.4	27.9	34.8
60 & over	14,972	15,998	17,521	+17.0	13.6	14.1	13.8
Female, total	116,473	119,514	133,790	+14.9%	100.0%	100.0%	100.0%
Under 5 yrs.	7,984	9,171	8,699	+ 9.0	6.9	7.7	6.5
5 to 9 yrs.	8,159	7,936	9,262	+13.5	7.0	6.6	6.9
10 to 14 yrs.	8,926	8,096	9,824	+10.1	7.7	6.8	7.3
15 to 19 yrs.	10,410	8,857	9,658	- 7.2	8.9	7.4	7.2

(continued)

The Retail Market

U.S. Population by Sex & Age, 1980 & Projections for 1985, 2000*
(continued)

	Number (Thous.)			% Change	% of Total		
	1980	1985	2000	2000/1980	1980	1985	2000
Female, total (cont'd.)							
20 to 34 yrs.	29,349	30,226	25,686	-12.5%	25.2%	25.3%	19.2%
35 to 59 yrs.	30,986	33,305	46,210	+49.1	26.6	27.9	34.5
60 & over	20,658	21,922	24,449	+18.3	17.7	18.3	18.3

*Series II projections, which assume a fertility rate of 2.1, or at the replacement level.
Note: Columns may not add to 100.0% due to rounding.

Source: U.S. Bureau of the Census, 1980 Census of Population and Current Population Reports, Series P-25, No. 704.

Consumer Expenditures

Consumer expenditures for footwear—measuring the value at retail of all footwear reaching consumers (nonmilitary) through any channel—amounted to $17.3 billion in 1980. This represented a gain of 7.4% over the 1979 total of $16.1 billion. In the first quarter of 1981 spending for footwear was at an annual rate of $19.0 billion, gaining 5.7% over the 4th quarter 1980 annual rate.

The share of total disposable income represented by footwear expenditures amounted to 0.9% in 1980, down slightly from 1.0% in 1979. Footwear spending accounted for 14.6% of total expenditures for apparel and footwear in 1980 compared with 14.9% in 1979.

Consumer Income & Expenditures for Apparel & Footwear
(Billions of Dollars)

	1980(p)	1979(r)	1978(r)
Disposable personal income	$1,821.7	$1,641.7	$1,462.9
Consumer expenditures for all goods and services	1,672.8	1,510.9	1,348.7
Clothing & footwear, total	104.7	98.9	91.9
Clothing:			
Women's & children's	57.2	54.0	50.3
Men's & boys'	30.1	28.6	26.8
Footwear, total	17.3	16.1	14.7
Women's & children's (e)	10.0	9.4	8.4
Men's & boys' (e)	7.3	6.7	6.3

(p) = preliminary (r) = revised (e) = estimated

Note: The value of clothing and footwear issued to military personnel is not included.

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

RETAIL TRADE

Consumer Expenditures

Measured in terms of a constant value (1972) dollar, consumer spending for footwear in 1980 was valued at $11.3 billion, showing a "real" loss of 0.5% compared with the 1979 constant dollar spending total.

Consumer Expenditures for Footwear
(In Billions of 1972 Dollars)

1980	1979	1978(r)	1977(r)	% Change 1980/1979
$11.3	$11.4	$11.2	$11.3	- 0.5%

On a dollar basis, shoe sales through all types of retail outlets in 1980 were up about 7% compared with 1979. This gain, however, was due primarily to higher prices; unit sales were generally below the year ago levels. Per capita consumption of shoes slipped from 4.4 pairs in 1979 to 4.2 pairs in 1980, on the average.

Much of the loss in units, according to the Footwear Council, was traceable to a drop in demand for fashion boots and for rubber/canvas shoes—markets which peaked in 1979. Hopes for sales gains in 1981 are centered on women's boots, which retailers hope will enjoy a fashion revival, as well as on closed dressy shoes for women with new decorative touches.

Shoe store business was fairly good in the first quarter of 1981, registering a gain of 12% over the same period of 1980 on a seasonally adjusted basis. Shoe promotions and special sales have been stepped up this year, with the best sales gains resulting in junior shoe business.

A Footwear News survey among 25 junior footwear manufacturers and importers found that strategies to reach and satisfy the junior market are undergoing a change. The market, which tended to be viewed as a narrow age bracket of 15 to 25 years of age, is now being broadened in definition to encompass older women who share with younger customers a strong sense of fashion as well as brand and price consciousness. In this group, shoes are a status symbol and rate high on the young women's shopping list.

Children's shoe business has gone from almost 100% in basics to fad and fashion in recent years—meaning for the stores higher inventories, more risks and more markdowns. Department stores and independents have found it difficult to operate in this framework and have lost sales share in children's footwear to booteries, concept stores and discounters. Children's shoes styles as athletic footwear are becoming more important.

In both men's and women's footwear the growing preference of customers for a more casual, more mobile lifestyle is reflected in the stronger sales performance of casual shoes compared with dress shoes. Growing increasingly accustomed to the look and comfort of athletic shoes, many customers will settle for casual shoes for a wide range of uses, attracted by economy as well as by comfort and the "look."

(continued)

Athletic Footwear

In recent years American consumers shifted their preference from traditional sneakers and tennis shoes to joggers and other athletic shoes for specific sports, such as racquetball and soccer. The fabric upper/rubber or plastics soled segment of the athletic footwear market consists of (1) higher priced, quality athletic shoes for specific sports and (2) low cost joggers and other athletic shoes and sneakers intended primarily for casual wear.

The booming market for athletic shoes tapered off in 1980. According to a report on 1980 sales compiled by the National Sporting Goods Association, unit sales of athletic footwear rose 6% compared with 1979. However, sales of running shoes registered a 4% decline in units and the gym shoe/sneaker category dropped 30%. Basketball shoe sales in terms of units climbed 10% and soccer shoe sales were up 8% in 1980 compared with 1979.

According to SPORTSTYLE (April 20, 1981), the trend is toward leisure, walking and multi-purpose footwear. Court shoes, particularly basketball styles, are replacing running shoes in popularity, reflecting the economy—they cost less and last longer—as well as diminished interest in jogging. Court shoes are also more versatile and can be worn with many of the new fashion looks.

Based on studies conducted by the Market Research Corporation of America which tracked purchases reported by a consumer panel of 7,500 households, the total active footwear market was valued at $1.170 billion in 1979, according to SPORTSTYLE. (April 21, 1980). In the first half of 1980, the market was valued at close to $700 million, of which sales to women accounted for 51.8%. (SPORTSTYLE, September 22, 1980).

The percent of 1980 athletic footwear customers who bought their shoes in each type of retail outlet, according to Market Research Corporation of America (MRCA) data compiled for SPORTSTYLE (April 20, 1981 issues) was reported as follows:

Percent of Reported Purchases of Athletic Footwear (Not Including Team Sales) By Type of Outlet, 1980

Retail Outlet Type	Women's	Men's
Total	100.0%	100.0%
Sporting goods stores	23.6	32.1
Discount stores	10.3	12.8
Department stores	7.8	5.9
Mail order chains (Sears, Ward, Penney)	7.3	5.1
Independent shoe store chains*	7.0	1.8
Specialty stores**	4.8	10.6
Mail order	1.9	2.0
Regional chains***	0.5	1.8
Other outlets	36.8	27.9

Stores are defined by MRCA as follows:

* Includes such groups as Kinney but not such footwear chains as Athletic Attic.

** Includes men's and women's apparel stores and also any apparel outlet not specifically defined by the consumer in the purchase diary.

*** Smaller department stores.

RETAIL TRADE

Consumer Price Trends

Price increases in footwear at the retail level began to moderate after the first quarter of 1980, reflecting the sharp drop in prices of raw hides and skins, which brought leather prices down more than 25% in 1980.

For the year 1980, the Consumer Price Index on footwear averaged 7.7% higher than in 1979. In the three months ending April 1981, the seasonally adjusted annual rate in the price index was 5.4% over the same period of 1980. Prices for men's footwear showed an average increase of 6.2% for the year 1980, women's were up 5.4%; boys' and girls' footwear, up 9.3%.

Consumer Price Index On Footwear
(For All Urban Consumers)
(1967 = 100)

Year	Annual Average
1978	163.8
1979	176.7
1980	190.3

Source: U.S. Bureau of Labor Statistics.

As of May 1981 consumer prices for footwear were up 0.9% over the previous month and rose 6.2% over May 1980. Consumer prices for men's footwear were up 0.8% for the month and 6.5% for the year; boys' and girls' footwear prices were up 0.9% for the month and 6.6% for the year. Women's footwear prices were up 0.9% in May 1981 compared with the previous month and were 5.7% higher than in May 1980.

Price increases in 1981 are expected to be relatively modest in view of plunging prices in steer hides. On the other hand, prices of nonleather shoe parts are continuing to rise. Increases of at least 10% are expected for 1981 in the prices of findings (linings, cement, heels, etc.) and a rise of 12% in lasts.

Sales by Area

Based on information compiled for 1979 by the American Footwear Industries Association on retail sales of footwear by states, the biggest share of volume was concentrated in the East North Central States (19%), followed by the Middle Atlantic States (17.4%).

Distribution of Footwear Retail Sales by Area

Total U.S.	100.0%
New England (Conn., Me., Mass., N.H., R.I., Vt.)	5.3
Middle Atlantic (N.J., N.Y., Pa.)	17.4
East North Central (Ill., Ind., Mich., Ohio, Wis.)	19.0
West North Central (Ia., Kans., Minn., Mo., Nev., N.D., S.D.)	8.0
South Atlantic (Del., D.C., Fla., Ga., Md., N.C., S.C., Va., W. Va.)	15.5
East South Central (Ala., Ky., Miss., Tenn.)	5.7
West South Central (Ark., La., Okla., Tex.)	10.7
Mountain (Ariz., Colo., Id., Mont., Nev., N.M., Utah, Wyo.)	3.8
Pacific (Calif., Ore., Wash., Alas., Haw.)	14.6

Sales by Area

Footwear Sales
In 25 Leading Metropolitan Areas, 1979

Rank	Metropolitan Area	Total Footwear Sales (All Outlets) Mil. $	% of U.S. Total	% Change 1979/1978	Footwear Sales In Shoe Stores & Other Apparel Specialty Stores* (Mil. $)
1	New York	$655.4	4.8%	+10.4%	$479.4
2	Chicago	569.4	4.1	+ 0.3	339.6
3	Los Angeles-Long Beach	463.6	3.4	- 4.4	286.3
4	Detroit	322.7	2.3	+12.7	203.9
5	Philadelphia	303.2	2.2	+ 4.6	197.1
6	Boston-Lowell-Brockton-Lawrence-Haverhill	274.3	2.0	+15.8	170.2
7	Houston	255.1	1.8	+ 9.8	152.1
8	Dallas-Fort Worth	234.5	1.7	+20.4	134.8
9	Washington, D.C.	234.2	1.7	+10.8	150.6
10	San Francisco-Oakland	208.0	1.5	- 9.8	126.1
11	Nassau-Suffolk	185.6	1.3	+17.9	128.0
12	St. Louis	160.6	1.2	+13.2	87.3
13	Pittsburgh	157.1	1.1	+16.0	85.7
14	Minneapolis-St. Paul	154.0	1.1	+ 7.7	72.3
15	Atlanta	134.3	1.0	+ 9.0	70.7
16	Miami	132.4	1.0	+10.8	86.2
17	Anaheim-Santa Ana-Garden Grove	125.4	0.9	+ 2.7	68.0
18	Baltimore	123.9	0.9	+16.9	81.2
19	Cleveland	122.8	0.9	+11.0	69.0
20	Newark	122.6	0.9	+10.8	97.3
21	Seattle-Everett	121.1	0.9	+ 1.2	73.9
22	San Diego	109.5	0.8	+10.5	60.4
23	Kansas City, Mo.	107.4	0.8	+ 7.7	57.8
24	Denver-Boulder	106.4	0.8	+ 3.0	60.9
25	New Orleans	101.9	0.7	- 2.1	58.8
25 METRO TOTAL		$5,485.4	39.8%	+ 7.0%	$3,397.6
TOTAL, U.S.		$13,762.4	100.0%	+ 8.9%	$8,094.0

*Includes sales in shoe stores as well as apparel specialty stores such as men's and women's clothing stores and family clothing stores.

Source: Based on Sales & Marketing Management "Survey of Buying Power," 1980.

RETAIL TRADE

Sales By Type of Outlet

Estimates on footwear sales by types of retail outlets, including only stores with payroll, have been compiled by the American Footwear Industries Association. Projections for 1982 show a bigger share of the market for department stores and for mail order houses, while general merchandise stores, shoe stores and apparel stores lost some of the percentage share of the total market.

Total sales of footwear in retail outlets with payroll (excludes the mama-papa stores) reached an estimated total of $12.4 billion in 1978, according to AFIA, and were projected to $16.0 billion by 1982.

Percent of Total Footwear Sales
By Type of Retail Outlet With Payroll, Estimated 1980, Projected 1982

	1980	1982
Total	100.0%	100.0%
Shoe stores	49.0	48.9
Department stores	30.3	30.7
Apparel stores	11.0	10.8
General merchandise stores	2.9	2.5
Variety stores	1.9	1.5
Mail order	2.0	2.3
All other	2.9	3.3

Source: AFIA

A report on footwear sales in terms of pairage, compiled by the Footwear Council and Chain Store Age, indicated that the big general merchandisers, including department stores, Sears, Ward and Penney, accounted for 30% of total 1980 sales. Shoe chains followed, with a 28% share of sales in terms of pairs; discounters and variety stores, 22%, independent shoe stores and apparel stores, 12%; general stores, 8%.

Official figures, based on a nationwide census of stores, on footwear sales by type of outlet is collected every five years by the U.S. Bureau of the Census. The latest information available is based on the 1977 Census and was published by the Bureau in September 1980.

Following are tables covering footwear sales by outlet type reported in the census (covering only stores with payrolls), as well as detailed information profiling shoe stores, as reported in the 1977 Census of Retail Trade.

RETAIL TRADE

Sales By Type of Outlet

Total Footwear (Except Infants' & Toddlers') Sales by Type of Retail Outlet, 1972, 1977
(Includes only stores with payroll)

	1977				1972			
	Stores		Sales		Stores		Sales	
	Number	%	Mil. $	%	Number	%	Mil. $	%
Footwear sales, all outlets	97,792	100.0%	$10,649.5	100.0%	93,565	100.0%	$7,672.6	100.0%
Store types:								
Gen. mdse. stores, total	30,509	31.2	3,547.5	33.3	32,753	35.0	2,692.0	35.1
Dept. stores	8,507	8.7	3,045.1	28.6	7,492	8.0	2,255.7	29.4
Other gen. mdse. stores	22,002	22.5	502.4	4.7	25,261	27.0	436.3	5.7
Shoe stores	24,450	25.0	5,219.7	49.0	23,390	25.0	3,669.0	47.8
Men's shoe stores	3,306	3.4	653.0	6.1	2,583	2.8	416.1	5.4
Women's shoe stores	4,934	5.1	1,175.9	11.0	5,077	5.4	838.1	10.9
Children's shoe stores	901	0.9	136.1	1.3	803	0.9	96.8	1.3
Family shoe stores	15,309	15.6	3,254.6	30.6	14,927	15.9	2,318.1	30.2
Other apparel/accessories specialty stores	23,620	24.1	1,304.1	12.2	21,624	23.1	965.0	12.6
Other retail stores	15,491	15.8	340.3	3.2	12,376	13.2	171.9	2.2
Sporting goods stores								
Gen. line	3,114	3.2	157.1	1.5	nr	--	nr	--
Specialty line	1,185	1.2	25.9	0.2	374	0.4	4.9	0.1
Non-store retailers								
Mail order houses	3,671	3.7	208.2	2.0	3,376	3.6	141.7	1.8
Direct selling estabs.	51	*	30.1	0.3	46	*	33.0	0.4

nr = not reported
* Less than 0.1%

NOTE: Each business location is separately counted as a store unit, including each unit in a multi-unit organization. Department store discount operations and outlets operated by mail order chains which meet the Standard Industrial Classification definition for a department store are included in that store classification.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Sales of footwear by category (men's, women's and children's) were reported in the 1977 census reports for the major outlet types. The total analyzed by outlet type represented a total of $9.720 billion in sales, or 91.3% of total footwear sales in all outlets with payrolls.

Reported data by footwear category are shown in the following tables.

In the above table, the total for footwear sales includes footwear accessories (such as laces, polishes, etc.), reported at $238 million in 1977. Shoe stores accounted for 61.8% of this total; department stores, 32.6%.

Sales By Type of Outlet

Contribution of Footwear To Total Store Sales, 1977
(Selected Outlet Types)

	No. of Stores Selling Item	Sales of Item		
			% of Total Store Sales	
		Mil. $	Stores Selling Item	All Stores of This Type*
Department stores				100.0%
Footwear, exc. infants' & toddlers'	8,507	$3,045.1	4.1	4.0
Men's & boys' footwear	8,114	1,058.3	1.5	1.4
Women's & girls' footwear	8,364	1,612.4	2.2	2.1
Children's footwear	5,872	296.9	0.5	0.4
Footwear accessories	4,584	77.5	0.2	0.1
Shoe stores				
Men's shoe stores:				
Footwear, exc. infants' & toddlers'	3,306	653.0	97.6	97.6
Men's & boys' footwear	3,306	621.3	92.8	92.8
Women's shoe stores:				
Footwear, exc. infants' & toddlers'	4,934	1,175.9	92.1	92.1
Women's & girls' footwear	4,934	1,096.8	85.9	85.9
Children's & juveniles' shoe stores				
Children's footwear, (not incl. infants' & toddlers')	901	128.8	90.7	90.7
Apparel specialty stores:				
Men's & boys' wear stores				
Footwear, exc. infants' & toddlers'	7,084	270.1	8.5	3.9
Women's ready-to-wear stores				
Footwear, exc. infants' & toddlers'	4,384	366.4	10.7	3.0
Family clothing stores				
Footwear, exc. infants' & toddlers'	10,184	615.4	10.0	7.8
Men's & boys' footwear	9,776	293.1	5.0	3.7
Women's & girls' footwear	8,840	264.7	4.7	3.4
Children's footwear	4,366	48.5	2.1	0.6
Footwear accessories	8,848	103.0	1.8	1.3

*The first column covers the percent of total sales of only those stores that sell the footwear type listed. The second column covers the percent of total sales of all stores of the type listed represented by specified footwear—some of which do not carry footwear in all cases.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977, (MC77-L).

Sales By Type of Outlet

Retail Sales of Specified Footwear Categories by Type of Retail Outlet, 1977
(Includes only stores with payroll)

Men's & Boys' Footwear	Stores		Sales	
	No.	%	Mil. $	%
Total	49,124	100.0%	$3,550.8	100.0%
Store types reporting sales:				
Department stores	8,114	16.5	1,058.3	29.8
Shoe stores, total	19,943	40.6	1,848.3	52.0
Men's shoe stores	3,306	6.7	621.3	17.5
Women's shoe stores	1,150	2.3	30.0	0.8
Children's shoe stores	187	0.4	2.6	0.1
Family shoe stores	15,300	31.1	1,194.4	33.6
Apparel specialty stores:				
Men's & boys' wear stores	7,011	14.3	245.4	6.9
Women's ready-to-wear stores	667	1.4	20.5	0.6
Family clothing stores	9,776	19.9	293.1	8.3
Mail order houses	3,613	7.3	85.2	2.4
Women's & Girls' Footwear				
Total	46,793	100.0%	$4,907.2	100.0%
Store types reporting sales:				
Department stores	8,364	17.9	1,612.4	32.9
Shoe stores, total	20,775	44.4	2,576.1	52.5
Men's shoe stores	323	0.7	6.1	0.1
Women's shoe stores	4,934	10.5	1,096.8	22.3
Children's shoe stores	218	0.5	3.0	0.1
Family shoe stores	15,300	32.7	1,470.2	30.0
Apparel specialty stores:				
Men's & boys' wear stores	960	2.0	15.9	0.3
Women's ready-to-wear stores	4,223	9.0	331.8	6.8
Family clothing stores	8,840	18.9	264.7	5.4
Mail order houses	3,631	7.8	106.3	2.2
Children's Footwear (not incl. infants' & toddlers')				
Total	30,393	100.0%	$1,024.6	100.0%
Store types reporting sales:				
Department stores	5,872	19.3	296.9	29.0

(continued)

Sales By Type of Outlet

Retail Sales of Specified Footwear Categories by Type of Retail Outlet, 1977
(Includes only stores with payroll)
(continued)

	Stores		Sales	
	No.	%	Mil. $	%
Children's Footwear (continued)				
Shoe stores, total	15,920	52.4%	$ 648.3	63.3
Men's shoe stores	428	1.4	6.1	0.6
Women's shoe stores	1,076	3.5	26.6	2.6
Children's shoe stores	901	3.0	128.8	12.6
Family shoe stores	13,515	44.5	486.8	47.5
Apparel specialty stores				
Men's & boys' wear stores	575	1.9	4.5	0.4
Women's ready-to-wear stores	543	1.8	12.6	1.2
Family clothing stores	4,366	14.4	48.5	4.7
Mail order houses	3,117	10.2	13.8	1.4

NOTE: Columns may not add to 100.0% due to rounding.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977, (MC77-L).

Shoe Stores

The 1977 Census of Retail Trade indicated that shoe stores have been increasing their share of total footwear business. They have also been increasing in number. While the count on shoe firms has declined, there are more shoe stores because of the growth of multi-unit operations. Sales are now more highly concentrated among the larger shoe store firms.

In the five-year period 1972 through 1977, the number of companies operating shoe stores declined 1.5%, dropping from 15,219 to 14,985. However, the number of shoe stores operated showed a 3.9% increase while dollar sales rose about 39%. Family shoe stores—selling footwear for men, women and children—were the dominant type of shoe outlet, with about 62% of the shoe store business. The fastest growth since 1972, however, was reported for men's shoe stores, which rose 28% in number of stores, 51% in sales volume in 1977 compared with 1972.

Shoe Stores

Trends in the Number of Shoe Stores in the U.S.

	Number			Sales (Mil. $)		
	1977	1972	% Change	1977	1972	% Change
Shoe store firms	14,985	15,219	- 1.5%			
Shoe stores, all types, total	27,891	26,850	+ 3.9	$5,650.2	$4,074.6	+38.7%
Stores with payroll*						
Total shoe stores with payroll	24,450	23,390	+ 4.5	5,517.2	3,972.3	+38.9
Family shoe stores	15,309	14,927	+ 2.6	3,428.5	2,481.5	+38.2
Women's shoe stores	4,934	5,077	- 2.8	1,277.3	944.6	+35.2
Men's shoe stores	3,306	2,583	+28.0	699.4	443.4	+51.0
Children's shoe stores	901	803	+12.2	142.0	102.9	+38.0

*Detailed information by type of shoe store was reported only for stores with one or more paid employees, as shown.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

The greatest percentage of shoe store firms are small operations, with annual volume under $500,000, but in 1977 close to 70% of all shoe store sales was concentrated among the 1,065 firms (7.1% of the total) with sales of $500,000 and up. These larger firms operated 13,237 shoe stores or 47.5% of all shoe stores.

Distribution of Shoe Stores by Sales Volume

	1977			1972		
	Firms	Stores	Sales	Firms	Stores	Sales
Total	14,985	27,891	$5,650.2	15,219	26,850	$4,074.6
Percent	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Annual sales—						
$500,000 & over	7.1	47.5	69.8	4.5	41.3	61.8
$100 mil. & over	*	19.6	28.6	*	13.0	22.2
$15 - $99.9 mil.	0.1	11.4	15.5	0.1	13.4	(D)
$5 - $14.9 mil.	0.3	4.8	6.5	0.2	5.0	(D)
$1 - $4.9 mil.	2.3	7.0	11.2	1.4	5.5	9.7
$0.5 - $0.9 mil.	4.4	4.7	8.0	2.8	4.4	7.2
Under $500,000	92.9	52.5	30.2	95.5	58.7	38.2

*Less than 0.1%
(D) Figures withheld by Census Bureau to avoid disclosure of individual operations.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1972, 1977.

Shoe Stores

While there were close to 15,000 shoe store companies in operation in 1977 (including both single unit and multi-unit operations), the 50 largest firms operated 34.4% of the shoe stores and controlled almost half of total shoe store sales.

Sales Concentration Among Shoe Retailing Firms

	Stores		Sales	
	1977	1972	1977	1972
Total shoe stores operated by all firms	100.0%	100.0%	100.0%	100.0%
Operated by the				
4 largest firms	13.3	11.6	22.8	19.6
8 largest firms	21.0	18.3	30.4	27.6
20 largest firms	29.6	25.9	42.1	37.7
50 largest firms	34.4	31.1	48.6	44.5

A comparison of 1977 and 1972 censuses of retail trade reports, issued by the U.S. Census Bureau, shows the growing concentration of shoe store business among multi-unit companies with six or more stores. Chains of this size accounted for close to 57% of total shoe store business while representing 41.3% of total stores. In 1972 chains of six or more shoe stores had 37.4% of all shoe stores and accounted for 51.5% of total shoe store business. Stores in chains of 11 or more stores had 38.3% of the stores in 1977 and accounted for 51.9% of sales. Comparable figures for 1972 were 34.5% and 47.7%, respectively.

Single vs. Multi-Unit Shoe Stores: Sales Share

	Firms		Stores		Sales*		% Increase in Sales
	1977	1972	1977	1972	1977	1972	1977/1972
Total	14,985	15,219	27,891	26,850	$5,576.8	$3,982.0	+ 40.0%
Percent	100.0	100.0	100.0	100.0	100.0	100.0	--
Single units	92.0	91.5	49.4	51.9	32.3	36.0	25.7
2 - 3 store organizations	5.4	5.9	6.6	7.5	7.8	8.8	23.9
4 - 5 store organizations	1.1	1.3	2.7	3.2	3.2	3.7	21.6
6 - 10 store organizations	0.8	0.7	3.0	2.9	4.8	3.8	77.4
11 or more store organizations	0.7	0.6	38.3	34.5	51.9	47.7	52.3

*Dollar figures are in millions.

Source: Fairchild Market Research Department based on U.S. Bureau of the Census, Census of Retail Trade, 1972, 1977

(continued)

Shoe Stores

Shoe stores showed a greater concentration of business in their chief category, footwear, despite the fact that many more stores had diversified their stocks in 1977 compared with 1972.

Among family shoe stores, for example, the percentage of stores reporting sales of men's wear items—particularly hosiery—jumped from 5.9% of the stores in this classification in 1972 to over 20% in 1977. Sales of men's wear items other than footwear contributed 1.2% of total family shoe store business in 1977 compared with 0.4% five years earlier.

A detailed comparison of the merchandise mix of shoe stores of various types in 1977 and in 1972 follows.

Shoe Store Sales: Total & Major Merchandise Classifications

Shoe stores by type & merchandise types carried (selected list)	1977		1972	
	Stores*	Sales**	Stores*	Sales**
Family shoe stores	15,309	$3,428.5	14,927	$2,481.5
Total, all merchandise	100.0%	100.0%	100.0%	100.0%
Footwear	100.0	94.9	100.0	93.4
Men's & boys'	99.9	34.8	100.0	33.3
Women's & girls'	99.9	42.9	99.9	44.9
Children's	88.3	14.2	84.7	15.3
Footwear accessories	72.1	3.0	nr	nr
Men's & boys' clothing & access.	21.7	1.2	5.9	0.4
Women's & girls' clothing & access.	46.4	3.5	44.1	3.2
Hosiery	25.7	0.4	26.9	0.7
Handbags & small leather goods	38.3	1.8	38.8	1.8
Separates & coordinates	1.1	0.1	1.0	0.1
Accessories	0.8	0.1	nr	nr
Other merchandise & receipts	--	0.4	--	3.0
Women's shoe stores	4,934	$1,277.3	5,077	$ 944.6
Total, all merchandise	100.0%	100.0%	100.0%	100.0%
Footwear	100.0	92.1	100.0	88.7
Women's & girls' clothing & access.	53.2	7.5	51.6	7.7
Handbags & small leather goods	49.9	5.1	48.9	5.1
Hosiery	33.7	1.3	30.7	1.2
Other merchandise & receipts	--	0.4	--	3.6
Men's & boys' shoe stores	3,306	$ 669.4	2,583	$ 443.4
Total, all merchandise	100.0%	100.0%	100.0%	100.0%
Footwear	100.0	97.6	100.0	93.9
Men's & boys' clothing & access.	20.7	2.0	26.5	1.8
Hosiery, underwear, etc.	15.6	0.6	nr	nr
Women's & girls' clothing & access.	3.7	0.2	1.1	0.2
Handbags & small leather goods	1.5	0.1	nr	nr
Other merchandise & receipts	--	0.2	--	4.1

(continued)

Shoe Stores

Shoe Store Sales: Total & Major Merchandise Classifications
(continued)

	1977		1972	
	Stores*	Sales**	Stores*	Sales**
Children's shoe stores	901	142.0	803	$ 102.9
Total, all merchandise	100.0%	100.0%	100.0%	100.0%
Footwear	100.0	95.9	100.0	94.1
Women's & girls' clothing & access.	20.1	3.9	13.4	3.4
Infants' & toddlers' clothing	18.1	3.4	11.0	0.1
Other merchandise & receipts	--	0.2	--	2.5

nr = not reported
* Percentages in this column represent the number of stores reporting sales of the specified merchandise.
** Percentages in this column represent the percent of total sales of this store type represented by specified merchandise, including in the base stores which do not sell all types of merchandise listed.

Source: Fairchild Research Department based on U.S. Bureau of the Census, Census of Retail Trade, 1972, 1977.

Total sales of shoe stores in the U.S. in 1980 registered a gain of 8.4% compared with 1979; and in the first quarter of 1981 sales were up 7.8%. The share of shoe store sales of chains (11 or more stores) held at 46.1% in 1980 and 1979, down from 48.1% in 1978, according to Census Bureau revised data.

Shoe Store Sales, 1978-1980
(Millions of Dollars)

				% Change	
	1980	1979(r)	1978(r)	1980/79	1979/78
Shoe store sales, total	$8,040	$7,418	$6,501	+ 8.4	+14.1
Chains (11 or more stores)	3,707	3,420	3,129	+ 8.4	+ 9.3
Chain store sales, % of total shoe store sales	46.1%	46.1%	48.1%	--	--

(r) = revised

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales and Inventories: Current Business Reports (BR-13-80S).

Shoe Stores

Seasonal Patterns in Shoe Store Sales, 1977-1980
Percent of Year's Sales by Month

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1980	7.0	6.0	7.8	8.7	8.2	7.5	7.2	9.0	8.6	9.0	9.3	11.7	100.0%
1979(r)	6.5	5.5	7.9	8.7	7.9	7.7	7.2	9.1	8.9	9.3	9.3	12.0	100.0
1978(r)	6.3	5.6	8.5	7.9	8.0	7.8	7.1	8.7	9.1	8.8	9.4	12.7	100.0
1977	6.3	5.9	7.4	8.9	7.5	7.4	7.5	8.8	9.1	9.1	9.5	12.6	100.0

Dates of Easter: 1981 - April 19; 1980-April 6; 1979-April 15; 1978-March 26; 1977-April 10.

(r) = revised.

Source: Based on U.S. Bureau of the Census, Monthly Retail Sales & Inventories (BR-13-80S).

Shoe Stores: Selected Operating Ratios - 1978, 1979
(Median Figures)

Year	Number of Companies Reporting	Current Assets to Current Debt (times)	Net Profits on Net Sales	Net Profits on Net Working Capital	Net Sales to Inventory (times)
1979	2,987	3.04	5.54%	22.98%	3.3
1978	2,866	3.01	5.16	21.52	3.3(r)

(r) = revised

Source: Dun & Bradstreet, Inc., Business Economics Div.

Department Stores

Total Department Store Sales, 1978 - 1980
(Millions of Dollars)

1980	1979	1978(r)	% Change 1980/79	% Change 1979/78
$94,185	$88,520	$81,494	+ 6.4%	+ 8.9%

Source: U.S. Bureau of the Census, Current Business Reports (BR-13-80S).

In the typical department store which had a total volume of $1 million or more, footwear departments (upstairs store) contributed 3.7% of total store sales in 1979, according to the National Retail Merchants Association. Among stores reporting on women's and misses' shoe departments (upstairs), this department accounted for a median 2.4% of total sales.

(continued)

RETAIL TRADE

Department Stores

Compared with 1978, footwear sales in the typical department store gained 6.8%. Junior and teen shoes fared best, with a median increase of 9.2% among reporting stores. Children's shoe departments, on the other hand, showed a median loss of 3.1%.

Department Store Footwear Departments: Selected Operating Ratios, 1979
(Total Store Sales Over $1 Million)
(Median Results)

	Upstairs Store-Total All Shoes (49*)	Total Womens', Misses', Junior Shoes (29*)	Womens' & Misses' Dress & Casual Shoes (33*)	Junior & Teen Shoes (25*)	Men's Footwear (43*)	Children's Footwear (34*)	Budget Dept. Shoes, Total (29*)
Cumulative markon, %	50.8%	51.4%	51.3%	51.3%	49.0%	49.7%	50.2%
Net sales, % of change from 1977	6.8	9.4	7.7	9.2	4.4	3.1	5.8
Markdowns, % of net sales	15.8	16.2	17.9	19.1	12.3	10.6	13.3
Gross margin, % of net sales	44.5	44.2	45.0	44.7	44.6	46.6	44.6
Net sales, % of total store	3.7	3.2	2.3	0.7	0.6	0.3	2.4
Returns, % of gross sales	10.3	9.9	nr	nr	7.6	6.6	8.4
Sales promotion costs (net) % of sales	2.4	2.3	nr	nr	2.7	3.1	2.2
$ sales per sq. ft. of selling space	$121.0	$116.0	$127.9	nr	$127.9	$ 42.5	$ 99.1
Stock turns (times)	2.1	2.2	2.3	2.4	1.6	1.7	2.2

Source: National Retail Merchants Association, Merchandising & Operating Results, 1980 Edition.

Apparel Specialty Stores

The typical women's wear and family apparel store registered a gain of less than 2% in footwear sales in 1979 compared with 1978, according to the National Retail Merchants Association. In men's wear stores, according to the Menswear Retailers of America, footwear sales showed a typical gain of 10.1% in stores handling men's/boys' wear only, and a rise of 4.9% in men's wear stores which also sell women's wear.

RETAIL TRADE

Apparel Specialty Stores

Women's Specialty Stores & Family Clothing Stores: Selected Operating Ratios For Footwear Departments, 1979
(Total Store Volume Over $1 Million)
(Median Results)

Footwear departments (13*)	
Cumulative markon, %	52.7
Net sales, % of change from 1978	+ 1.8
Net sales, % of total store	4.8
Markdowns, % of net sales	20.0
Gross margin, % of net sales	43.0
Stock turns (times)	1.7

*The number of reporting companies in each category.

Source: National Retail Merchants Association, Merchandising & Operating Results, 1980 Edition.

Men's Wear Stores: Selected Operating Ratios for Men's & Boys' Shoe Departments, 1980
(Median Results)

	% of Total Store Sales	% Change in Sales 1980/79	Markdowns % of Men's Shoe Sales	Stock Turns Per Year (times)
Men's & boys' shoes:				
In men's wear stores handling men's wear only	6.5% (42)	+0.7% (36)	9.9% (27)	1.2 (21)
In men's wear stores which also sell women's wear	4.5 (41)	+0.3 (37)	12.6% (34)	1.4 (22)

Note: Figures in parentheses cover the number of reporting firms in each ratio.

Source: Menswear Retailers of America, Annual Business Survey, June 1981.

BUYING HABITS

In November 1980 a second study on footwear buying practices was conducted for Footwear News Magazine, to supplement the information developed in the 1979 study. Telephone interviews were again conducted for the publication by the Valley Forge Information Service, King of Prussia, Pa., among respondents selected in a national probability sample. Interviews were completed among 505 men and 604 women covering their footwear buying practices, and among 225 mothers of children under 13 years of age.

(continued)

BUYING HABITS

The major characteristics of respondents were as follows:

	Men (505)	Women (604)
Total	100.0%	100.0%
Age: 18-24	20.8	14.6
25-34	31.5	26.8
35-49	22.0	24.8
50 & over	25.3	32.6
No answer	0.4	1.2
Household income:		
Under $25,000	47.5	48.8
$25,000 - $34,999	25.9	26.8
$35,000 & over	18.0	12.4
No answer	8.6	11.9
Employment status:		
Working	76.0	53.3
Not working	24.0	46.7
Region of the U.S.:		
Northeast	24.4	23.5
North Central	27.7	28.0
South	32.1	32.3
West	15.8	16.2

Findings in the Footwear News Magazine surveys are covered in a series of reports appearing in each issue of the monthly publication. The following tables supplement information based on the November 1980 survey which have been published by Footwear News Magazine in the January through August 1981 issues.

Children's Shoes

A total of 225 interviews were conducted by telephone among mothers of children under 13 years of age throughout the country in November 1980. Responses covered 96 boys under 6 years of age and 107, ages 6 to 12; 88 girls under 6 and 107, ages 6 to 12, for a total of 394 children under 13 years of age.

Percent of Mothers Reporting That Their Children Influence Their Selection of Shoes

	Boys		Girls	
	Under 6	6 - 12 Yrs.	Under 6	6 - 12 Yrs.
Total mothers	34.1%	78.8%	26.3%	71.1%
Age of mother:				
18 to 24	33.3	100.0	26.7	33.3
25 to 34	27.9	73.9	18.4	72.1
Over 34	66.7	83.8	54.5	72.9
Employed	37.5	80.0	34.1	76.9
Not employed	21.1	77.5	17.1	65.9

(continued)

Children's Shoes (continued)

As noted above, boys under 13 years of age (particularly those under 6) have a greater "say" in the selection of their shoes than do girls. Mothers who are employed are apparently influenced by their children to a greater extent than those who are not working. In any case, after age 6, children play a large role in the selection of their shoes.

Chief Concerns of Children Who Influence Shoe Selections
(Percent of Mothers Reporting)

	Boys		Girls	
	Under 6	6 - 12 Yrs.	Under 6	6 - 12 yrs.
Chief concerns:				
Style	62.1%	77.6%	70.0%	88.1%
Color	55.2	31.3	25.0	32.2
Brand	24.1	19.4	15.0	11.9
Fit/comfort	3.4	1.5	10.0	-0-

Mothers are more likely to be loyal to a specific brand of shoe for their sons 6 to 12 years of age, and for younger boys, than for girls. Better than four out of 10 (43.5%) mothers said they usually get a specific brand in buying shoes for boys 6 to 12, a third usually buy a specific brand for younger boys. Comparable percentages for daughters were 28.9% and 29.3%, respectively.

While children exert most of their influence in regard to style selections in buying shoes for themselves, service from stores in fitting shoes, followed by price, are most frequently listed as important considerations by mothers in buying children's shoes. Help in fitting is particularly important to mothers in buying shoes for boys under six. The next most frequent references to the importance of this service was mentioned by mothers with daughters in the 6-to-12 age group. Shoes made of leather seem to be more important to mothers of older children (6-to-12) than younger children, and in shoes for girls rather than boys.

Considerations of Importance To Mothers In Buying Shoes
(Percent of Mothers Specifying Each Consideration)

	For Boys		For Girls	
	Under 6	6 to 12	Under 6	6 to 12
Service from store in fitting shoes	60.7%	44.7%	45.3%	49.4%
Price	47.6	49.4	36.0	53.0
Style	35.7	28.2	26.7	42.2
Shoes made of leather	27.4	34.1	29.3	42.2
Brand	35.7	28.2	25.3	28.9
Shoes made in the U.S.	17.9	18.8	20.0	24.1
Comfort/fit	3.6	3.5	9.3	3.6
Durability/quality	3.6	3.5	4.0	2.4
Total respondents on each sex/age group*	100.0%	100.0%	100.0%	100.0%

*Columns add to more than 100.0% due to multiple answers.

Children's Shoes (continued)

Mothers surveyed by Valley Forge Information Service were asked about the average price they paid for their children's shoes. In dress shoes for both boys and for girls the largest percentage of responses fell in the $15 to $24 range, accounting for over 40 percent in all cases. In buying casual shoes for children under 6 years of age, most mothers looked for shoes under $15. For children in the 6-to-12 group, the percentage of mothers who usually paid $15 to $24 exceeded the percentage paying under $15. Most mothers of boys and girls under 6 usually pay under $15 for their athletic footwear; for older children the percentage paying this amount and those paying from $15 to $24 was closer.

The number of mothers surveyed who were in households with an income of under $25,000 and those with household incomes of $25,000 and up were about equal. As expected, differences in the patterns in average price paid for children's shoes were noted among mothers in the two income groups.

Average Price Paid For Children's Shoes By Mothers Based On Household Income
(Percent of Mothers of Children In Each Age/Sex Group)

Type of Shoe & Average Price Paid	For Boys By Age				For Girls By Age			
	Under 6		6 to 12		Under 6		6 to 12	
Household income (thous.)	Under $25	$25+	Under $25	$25+	Under $25	$25+	Under $25	$25+
Dress shoes	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $15	38.9	27.5	21.2	9.1	54.3	17.1	38.2	15.9
$15 to $24	36.1	47.5	42.4	40.9	28.6	54.3	47.1	45.5
$25+	16.7	17.5	27.3	43.2	11.4	22.9	11.8	34.1
No answer/don't buy	8.3	7.5	9.1	6.8	5.7	5.7	2.9	4.5
Casual shoes	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Under $15	61.1	57.5	48.5	20.4	65.7	37.1	55.9	25.0
$15 to $24	16.7	25.0	24.2	45.5	20.0	37.1	29.4	54.5
$25+	5.6	10.0	15.2	31.8	8.6	11.5	11.8	18.2
No answer/don't buy	16.7	7.5	12.1	2.3	5.7	14.3	2.9	2.3
Athletic shoes	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Under $15	63.9	57.5	57.6	20.4	68.6	48.6	70.6	20.5
$15 to $24	8.3	25.0	24.2	43.2	8.6	22.9	14.7	50.0
$25+	--	10.0	6.1	31.8	2.9	2.8	2.9	20.4
No answer/don't buy	27.8	7.5	12.2	4.6	20.0	25.7	11.7	9.1
No. of mothers reporting	36	40	33	44	35	35	34	44

In buying all types of shoes for children under 6 years of age, particularly casual and athletic shoes, most mothers in households with incomes under $25,000 paid an average of $15 or less per pair. In buying dress shoes for boys, while the biggest percentage of mothers in this income bracket usually paid under $15 per pair (38.9%), a close percentage (36.1%) paid an average of from $15 to $24. Lower income mothers of daughters under six seemed more inclined to pay less than $15 per pair for dress shoes than noted for boys. Over half (54.3%) of responses were in this category as compared with 38.9% for boys.

(continued)

BUYING HABITS

Children's Shoes (continued)

The pattern of responses in regard to average price paid for shoes for children under 6 by mothers with incomes of $25,000 or more varied considerably for boys compared with girls. In dress shoes, most mothers paid an average of $15 to $24 for boys as well as for girls, but the percentage in this category was higher for girls—54.3% vs. 47.5%. Close to 23% of upper income mothers of girls under 6 paid an average of $25 or more for their daughters' dress shoes, while the comparable figure for mothers of boys was 17.5%.

Mothers in the $25,000 and up income bracket were evenly divided (at 37.1% each) in usually paying under $15 and from $15 to $24 for casual shoes for girls under 6, but well over half (57.5%) of the mothers of boys under 6 in that income group usually paid under $15 for their casual shoes.

For children from 6 to 12 years of age mothers in both income groups usually paid $15 to $24 for dress shoes, except for upper income mothers of boys, a higher percentage of whom reported paying $25 or more (43.2% vs. 40.9%). The price group of $15 to $24 was favored for casual and athletic shoes by mothers in the $25,000 and over bracket.

A bigger percentage were in the habit of paying $25 or more for athletic shoes for boys 6 to 12 years of age than for girls (31.8% vs. 20.4%).

BUYING HABITS—MEN

The survey conducted for Footwear News Magazine by Valley Forge Information Service in late fall, 1980, looked into the characteristics of 1980 shoe customers, their buying habits and plans in regard to filling footwear requirements in 1981. Findings based on interviews by telephone with 505 adult males, selected in a nationwide probability sample, are summarized in the following tables.

Characteristics of Male Customers Who Bought Shoes in 1980 & Plan To Buy Them in 1981

	Percent of Respondents*					
	Men Who Purchased in 1980		1980 Male Customers Who Plan To Buy Shoes in 1981			
			Casual Shoes		Dress Shoes	
	Casual Shoes	Dress Shoes	Percent	Av.# of Prs.	Percent	Av.# of Prs.
Total	49.3%	45.9%	90.0%	1.76%	84.1	1.66
Age:						
18 to 24	54.3	49.5	91.2	1.82	84.6	1.58
25 to 34	59.1	43.4	90.4	1.98	79.7	1.97
35 to 49	49.5	52.3	90.9	1.69	93.1	1.71
50 to 64	32.2	39.1	85.7	1.29	79.4	1.35
65 years & older	34.1	43.9	85.7	1.36	83.3	1.28
Household income: (thous.)						
Under $25	42.9	37.9	91.3	1.65	84.6	1.53
$25 to $34.9	53.4	50.4	95.7	1.73	87.9	1.68
$35 to $49.9	65.5	56.9	81.6	1.66	75.8	1.58
$50 & over	54.5	72.7	94.4	2.61	91.7	2.21
Region:						
Northeast	52.8	48.0	87.7	1.77	83.1	1.61
North Central	41.4	42.1	89.7	1.48	84.7	1.49
South	54.9	46.9	89.9	1.93	89.5	1.96
West	46.2	47.5	94.6	1.78	73.7	1.42
Fashion forerunners (men generally concerned with having the newest fashion look)	57.8	57.8	94.6	2.08	91.9	2.19

*The base, equal to 100.0%, for each percentage is the total number of males in each age group, each income group, each region, etc.

Data on plans to purchase reads (for example): Of male respondents 18 to 24 years of age who purchased one or more pairs of casual shoes in 1980, 91.2% plan to buy casual shoes again in 1981. The number of pairs to be purchased among this age group averaged 1.82.

Expectations on Price Trends

Most men interviewed toward the end of last year anticipated somewhat higher prices for shoes on their next shoe-buying trip than last year. Variations in the extent of price increases expected were noted in terms of demographics. For example, men in the Northeast were bracing for much higher prices to a greater extent than noted in other regions.

If faced with higher prices when next shopping for shoes, a greater percentage of men expect to go ahead and buy the shoes needed at the higher price than noted among women (37.2% vs. 24.8%), but almost the same percentage (38%) of the men said they would wait for sales.

Outlook on Shoe Prices & Expected Reaction To Higher Prices
(% of Male Respondents)

	Expect prices will be--				Expected Reaction To Higher Prices			
	Much Higher	Somewhat Higher	About Same	Lower	Would Buy Fewer Prs.	No Affect	Would Trade Down	Wait For Sale
All respondents*	28.5%	55.4%	14.3%	1.6%	15.1%	37.2%	9.1%	38.0%
Age:								
18 to 24	27.6	57.1	14.3	1.0	14.3	37.1	11.4	37.1
25 to 34	19.5	61.0	18.2	1.3	13.8	37.1	7.5	41.5
35 to 49	34.2	51.4	11.7	2.7	11.7	36.9	9.0	42.3
50 to 64	32.2	52.9	11.5	2.3	23.0	35.6	10.3	28.7
65 & over	43.9	43.9	12.2	--	14.6	39.0	7.3	36.6
Household income: (thous.)								
Under $25	31.7	52.9	13.7	1.2	15.0	31.3	10.0	42.5
$25 to $34.9	23.7	62.6	13.7	--	16.8	36.6	7.6	38.9
$35 to $49.9	25.9	60.3	12.1	1.7	13.8	51.7	5.2	29.3
$50 & over	18.2	60.6	15.2	6.1	6.1	63.6	6.1	24.2

*Base covers 505 male respondents in the survey. Where percentages do not add across to 100.0% the balance covers no answers.

Prices Paid—1981/1980

For younger men, the most popular price bracket for casual shoes was $20 to $34 in 1981. Among men 35 to 64 years of age, the biggest percentage plan to pay from $35 to $49 for their casual shoes this year. Most men expect to pay more for their casual shoes in 1981 than 1980, regardless of age or income.

In buying dress shoes in 1981, over a third of male respondents expected to pay from $35 to $49 per pair; the second largest group (29.7%) expected to pay from $50 to $74.

Prices — 1981/1980 (continued)

Price To Be Paid By Men For Shoes in 1981 & How This Compares With Price Paid in 1980
(% of Respondents)

	Price To Be Paid in 1981					1981 Price Compared To Price Paid in 1980			
	Under $20	$20-$34	$35-$49	$50-$74	$75+	More	[illegible]	Same	Don't Know
For casual shoes:									
All respondents*	10.3%	51.3%	29.0%	7.1%	2.2%	46.9%	17.4%	34.4%	1.3%
Age:									
18 to 24	--	73.1	23.1	1.9	1.9	36.5	26.9	34.6	1.2
25 to 34	14.1	56.5	21.2	7.1	1.2	45.9	15.3	37.6	1.2
35 to 49	14.0	32.0	36.0	12.0	6.0	60.0	16.0	22.0	2.0
50 to 64	16.7	29.2	50.0	4.2	--	41.7	8.3	50.0	--
65 & over	--	41.7	41.7	16.7	--	50.0	16.7	33.3	--
Household income: (thous.)									
Under $25	13.8	54.3	21.3	9.6	1.1	44.7	10.6	42.6	2.1
$25 to $34.9	6.0	55.2	31.3	6.0	1.5	44.8	22.4	31.3	1.5
$35 to $49.9	16.1	32.3	41.9	3.2	6.5	58.1	19.4	22.6	--
$50 & over	--	47.1	41.2	5.9	5.9	41.2	23.5	35.3	--
Region:									
Northeast	10.5	47.4	31.6	8.8	1.8	35.1	22.8	40.4	1.8
North Central	15.4	48.1	32.7	1.9	1.9	51.9	13.5	32.7	1.9
South	6.3	50.0	31.3	8.7	3.7	52.5	17.5	28.7	1.2
West	11.4	65.7	14.3	8.6	--	45.7	14.3	40.0	--
For dress shoes:									
All respondents*	2.1	21.5	34.4	29.7	11.8	54.5	15.4	29.2	1.0
Age:									
18 to 24	--	29.5	38.6	25.0	4.5	65.9	18.2	13.6	2.3
25 to 34	1.8	16.4	34.5	34.5	12.7	50.9	18.2	29.1	1.8
35 to 49	--	18.5	29.6	27.8	24.1	46.3	14.8	38.9	--
50 to 64	11.1	14.8	33.3	37.0	3.7	63.0	3.7	33.0	--
65 & over	--	29.5	38.6	25.0	4.5	46.7	20.0	33.3	--
Household income: (thous.)									
Under $25	5.2	22.1	44.2	22.1	5.2	54.5	18.2	26.0	1.3
$25 to $34.9	--	20.7	34.5	36.2	8.6	55.2	15.5	27.6	1.7
$35 to $49.9	--	16.0	24.0	44.0	16.0	54.5	18.2	26.0	1.3
$50 & over	--	13.6	18.2	27.3	40.9	50.0	13.6	36.4	--
Region:									
Northeast	2.0	18.4	30.6	42.9	6.1	53.1	18.4	28.6	--
North Central	2.0	22.0	36.0	24.0	14.0	58.0	16.0	24.0	2.0
South	1.5	20.6	42.6	20.6	14.7	52.5	17.5	28.7	1.2
West	3.6	28.6	17.9	39.3	10.7	45.7	14.3	40.0	--

*Bases cover 224 men who bought casual shoes in 1980 and expect to buy them again in 1981, and 195 men who bought dress shoes in 1980 and expect to buy them in 1981. (Where columns on "Price Paid" do not add to 100.0%, the balance is due to "no answer.")

BUYING HABITS—MEN

Athletic Footwear

Among the 505 men 18 years and older selected in a nationwide sample of adults, who were interviewed for Footwear News Magazine, over half (55.2%) had purchased footwear for a specific sport.

Significant variations in the level of interest were noted on a regional basis. The West claimed the biggest percentage of active sports footwear (70.3%); the South, the smallest (49.4%).

Concern with image is a factor in the purchase of footwear for active sports among men, and among male survey respondents who described themselves as wanting the newest fashion look, over 70% had purchased footwear designed for a specific sport.

When purchasers were asked where they usually buy athletic footwear, men named a variety of outlets. Overall, specialty athletic footwear stores were mentioned most frequently, and were particularly popular among younger men (under 35). General-line sporting goods stores ranked second in number of mentions, specialty line, third, with a variation in the pattern based on age and income.

Purchase Patterns For Athletic Footwear By Age & Income
(% of Male Respondents)

		Age				Household Income (thous.)		
	Total	18-24	25-34	35-49	50+	Under $25	$25-$34.9	$35+
Purchasers of athletic footwear	55.2%	75.2%	66.0%	50.5%	30.5%	45.4%	64.1%	71.4%
Usual place of purchase of athletic footwear:								
Total male purchasers	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Specialty athletic footwear store	21.5	27.8	24.8	16.1	7.7	19.3	23.8	24.6
Sporting goods store								
General-line	19.4	17.7	21.9	16.1	20.5	16.5	14.3	26.2
Specialty-line	16.8	22.8	13.3	10.7	23.1	12.8	16.7	18.5
Department store	16.1	12.7	14.3	16.8	12.8	17.4	19.0	10.8
Shoe store-conventional	15.1	10.1	14.3	19.6	20.5	17.4	17.9	10.8
Shoe store-discount	7.5	6.3	8.6	8.9	5.1	11.9	6.0	4.6
Other (PX/Base Exch., mail order, etc.)	3.6	2.6	2.8	1.8	10.3	4.6	2.3	4.5

Of those men in the survey who were identified as active sports-minded, and had at sometime purchased functional athletic footwear, 80% had bought one or more pairs in 1980. However, looking ahead to 1981, only 69% had plans to buy athletic footwear. The 1980 purchasers who bought more than one pair accounted for 40%, but only a third of those planning to buy athletic shoes in 1981 expected to buy more than one pair.

The percentage of men interested in athletic shoes was highest among the 18-to-24 age group.

Athletic Footwear (continued)

Percent of Men Who Had Ever Bought Athletic Footwear Who Purchased in 1980 & Percent Who Expect To Buy Athletic Footwear in 1981

	Total	Age				Household Income (thous.)		
		18-24	25-34	35-49	50+	Under $25	$25-$34.9	$35+
Men who ever purchased athletic footwear:	100.0%	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Bought 1 or more pair in 1980	79.9	92.4	80.0	80.4	53.8	78.0	84.5	75.4
Expect to buy in 1981	68.8	86.1	70.5	62.5	38.5	72.5	69.0	64.6

Attitudes Toward Imports

The survey among a sample of 505 adult men throughout the country, conducted for Footwear News Magazine, developed information in regard to imported shoes in general, and attitudes in regard to specific countries, as noted below.

	% Who Ever Look At Labels To See Country Where Shoes Were Made	% Who Will Not Buy Shoes From Specific Countries	Countries Most Frequently Mentioned (In order of no. of mentions)
Total respondents	61.2%	20.2%	
Age:			
18 - 24	58.1	15.2	Japan, Taiwan, "Any"** (68.2%)
25 - 34	57.2	18.9	Japan, "Any," Taiwan, Korea, Mexico (47.1%)
35 - 49	69.4	21.6	"Any," Japan, Korea, Russia (71.4%)
50 - 64	63.2	26.4	"Any," Japan (48.2%)
65+	58.5	22.0	Taiwan, Russia, Japan (48.2%)
Household income:			
Under $35,000	63.6	20.7	"Any," Japan, Taiwan (51.1%)
$35,000+	51.6	23.1	"Any," Japan, Taiwan (52.0%)
Regions:			
Northeast	62.6	21.1	
North Central	60.7	18.6	
South	60.5	19.8	
West	61.2	22.5	
Fashion forerunner	60.9	10.9	

*Percentages represent the share of total mentions of all countries represented by the listed countries.
**Covers response "any country outside of the U.S."

About 44% of the men surveyed said that 11 of the dress or casual shoes purchased in 1980 were domestic manufactures, 21% said most of them were; 17%, less than half; 8.3% said all of them were imports. The remainder did not buy shoes last year, or did not know the country of origin.

(continued)

Attitudes Toward Imports (continued)

Concentration of responses indicating that all shoes were U.S.-made increased with advancing age, ranging from a third of men 18 to 24 years of age to over 60% of those over 50. Eclectic men, interested in keeping up with fashion and styles, are the least likely to confine their purchases to made-in-the-U.S. footwear.

Usual Place-of-Purchase

Regular-price shoe stores top the list of retail outlet types favored by adult male customers in buying either dress shoes or casual shoes, according to the Footwear News Magazine survey, with department stores in second place in terms of number of mentions on the usual place of purchase for these shoes. There were variations in the pattern, based on age, income and other factors.

Over half of the male respondents in the Northeast and North Central region of the country said they usually buy their dress and casual shoes in regular-price shoe stores, but the percentages were smaller in the South and in the West—department stores picking up the slack in these regions.

Store Types Where Casual & Dress Shoes Are Usually Bought
(% of Respondents)

		Age Group					Income (thous.)			
	Total	18-24	25-34	35-49	50-64	65+	Under $25	$25-$34.9	$35-$49.9	$50 & Over
Men's casual shoes										
Total respondents	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Reg.-price shoe store	43.8	50.5	37.7	38.7	48.3	53.7	40.4	45.0	46.6	60.6
Department store	22.6	23.8	24.5	21.6	20.7	19.5	26.2	21.4	13.8	18.2
Mass merchandiser	9.5	5.7	6.9	15.3	8.0	17.1	9.6	10.7	12.1	3.0
Discount shoe store	8.7	4.8	13.8	7.2	8.0	2.4	11.2	8.4	3.4	6.1
Apparel store	6.3	6.7	7.5	9.0	3.4	--	3.7	8.4	13.8	6.1
Discount store	2.2	1.9	3.8	1.8	1.1	--	2.5	1.5	5.2	--
Other outlets*	6.0	5.7	5.1	5.4	9.2	4.9	5.5	4.6	5.2	3.0
Men's dress shoes										
Total respondents	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Reg.-price shoe store	50.5	56.4	45.9	44.1	56.3	58.5	47.5	50.4	46.6	69.7
Department store	20.0	23.8	20.1	18.9	18.4	17.1	22.9	19.1	15.5	12.1
Mass merchandiser	8.5	4.8	6.9	14.4	5.7	14.6	9.2	9.2	10.3	3.0
Apparel store	6.5	5.7	10.1	7.2	3.4	--	2.9	10.7	13.8	6.1
Discount store	2.2	1.9	3.8	0.9	1.1	--	2.1	2.3	3.4	--
Other outlets*	4.8	1.9	2.6	6.3	10.3	4.9	5.9	2.3	8.6	3.0

Store Selection

In selecting a store in which to buy shoes, men interviewed in the Footwear News Magazine survey generally rated price the first consideration. Fashion or style ranked next, followed by convenience of the store location, then by sales help.

(continued)

BUYING HABITS—MEN

Store Selection (continued)

There were variations in the pattern when responses were analyzed by demographic characteristics. Younger men (under 35) put more emphasis on price as a factor in store selection than did older men and, as expected, price is more important to men with incomes under $25,000 than to the more affluent, who are more likely to consider fashion and style before price, as do men who are described as fashion forerunners.

The number of stores men shopped in before making a final selection of shoes averaged 3.11. It was higher among younger shoppers, averaging 3.72 stores among men 18 to 24, and reached a low of 2.64 stores among men 50 to 64 years of age. On a regional basis, shoppers are most active in the West, where the number of stores shopped by male shoe customers averaged 3.38.

BUYING HABITS—WOMEN

The survey conducted for Footwear News Magazine by Valley Forge Information Service in late fall, 1980, included interviews by telephone with 604 adult females, selected in a nationwide probability sample. Findings are summarized in the following tables.

Characteristics of Female Customers Who Bought Shoes in 1980 & Plan To Buy Them in 1981

	Percent of Respondents*					
	Women Who Purchased in 1980		1980 Female Customers Who Plan To Buy in 1981			
	Casual Shoes	Dress Shoes	Casual Shoes		Dress Shoes	
			Percent	Av.# of Prs.	Percent	Av.# of Prs.
All respondents	66.1%	57.9%	92.5%	2.35	88.8	2.12
Age:						
18 to 24	64.8	65.9	91.2	2.65	89.7	2.07
25 to 34	72.8	63.0	97.5	2.72	90.2	2.70
35 to 49	69.3	60.7	94.2	2.22	92.3	1.98
50 to 64	61.8	49.3	90.2	2.08	86.6	1.84
65 & over	54.1	47.5	78.8	1.56	75.9	1.25
Household Income: (thous.)						
Under $25	59.7	50.2	88.6	1.98	85.8	1.73
$25 - $34.9	75.3	69.1	95.9	2.64	85.7	2.14
$35 - $49.9	76.8	67.9	97.7	2.67	97.4	2.68
$50 & over	73.7	73.7	100.0	3.86	100.0	3.21
Region:						
Northeast	63.5	55.6	90.3	1.99	83.5	1.78
North Central	61.5	56.2	93.2	2.28	89.5	2.17
South	66.7	61.0	91.5	2.50	88.4	2.44
West	73.5	58.2	95.8	2.63	87.7	1.86
Fashion forerunners (women generally concerned with having the newest fashion look)	74.8	71.3	94.2	3.23	93.9	2.78

*The base, equal to 100.0%, for each percentage is the total number of females in each age group, each income group, each region, etc. (adding across).

Data on plans to purchase reads (for example): Of female respondents 18 to 24 years of age who purchased one or more pairs of casual shoes in 1980, 91.2% plan to buy casual shoes in 1981. The number of pairs to be purchased among this age group averaged 2.65.

BUYING HABITS--WOMEN

Expectations on Price Trends

When next shopping for shoes, over half the women interviewed expected somewhat higher prices but a substantial 31.5% were bracing for much higher prices compared with a year ago.

If faced with higher prices over half (51.3%) of the women said they would wait for sales; 24.8% said higher prices would not affect their buying plans at all and they would buy shoes needed at the higher prices. This was particularly true among women 18 to 24 years of age, and those in households with incomes upwards of $25,000.

Outlook on Shoe Prices & Expected Reaction To Higher Prices
(% of Female Respondents)

	Expect prices will be--				Expected Reaction To Higher Prices			
	Much Higher	Somewhat Higher	About Same	Lower	Would Buy Fewer Prs.	No Affect	Would Trade Down	Wait For Sale
All respondents*	31.5%	55.0%	12.4%	0.8%	16.6%	24.8%	6.6%	51.3%
Age:								
18 to 24	18.2	61.4	19.3	1.1	15.9	29.5	6.8	46.6
25 to 34	30.2	56 8	11.7	--	13.6	25.3	8.6	52.5
35 to 49	24.7	72.7	12.0	0.7	18.0	26.0	6.0	50.0
50 to 64	41.2	45.6	11.8	1.5	17.6	20.6	5.9	55.1
65 & over	45.9	44.3	8.2	1.6	19.7	21.3	4.9	52.5
Household income: (thous.)								
Under $25	39.7	46.8	12.2	1.0	13.9	19.0	6.4	60.0
$25 to $34.9	22.2	64.8	11.7	0.6	14.2	33.3	6.8	45.1
$35 to $49.9	16.1	69.6	12.5	1.8	26.8	28.6	7.1	37.5
$50 & over	21.1	57.9	21.1	--	52.6	26.3	10.5	10.5

*Base covers 604 female respondents in the survey. Where percentages do not add across to 100.0% the balance covers no answers.

Prices--1981/1980

Among women who bought casual shoes last year and plan to buy casual shoes again this year, 48% expect to pay more than in 1980, 34% will pay about the same price, 17% expect to pay less. For dress shoes, comparable percentages were 45%, 39% and 16%, respectively.

Prices—1981/1980

Price To Be Paid By Women For Shoes in 1981 & How This Compares With Price Paid in 1980
(% of Respondents)

	Price Paid in 1980					Expect To Pay in 1981			
	Under $20	$20-$34	$35-$49	$50-$74	$75+	More	Less	Same	Don't Know
For casual shoes:									
All respondents*	22.4%	60.1%	14.3%	2.2%	0.5%	48.0%	17.0%	34.0%	1.1%
Age:									
18 to 24	21.2	63.5	13.5	1.9	--	42.3	19.2	38.5	--
25 to 34	22.4	62.1	12.9	1.7	0.9	52.6	18.1	29.3	--
35 to 49	23.5	59.2	13.3	3.1	--	44.9	15.3	38.8	1.0
50 to 64	26.3	55.3	15.8	1.3	--	40.8	13.2	42.1	3.9
65 & over	11.1	59.3	22.2	3.7	3.7	70.4	22.2	7.4	--
Household income: (thous.)									
Under $25	30.6	55.4	12.7	0.6	--	49.0	14.0	35.7	1.3
$25 to $34.9	17.8	65.3	13.6	1.7	1.7	44.1	20.3	33.9	1.7
$35 to $49.9	16.7	61.9	14.3	7.1	--	54.8	14.3	31.0	--
$50 & over	7.1	57.1	35.7	--	--	42.9	14.3	42.9	--
Region:									
Northeast	19.0	58.3	19.0	--	2.4	46.4	15.5	36.9	1.2
North Central	30.6	58.2	9.2	1.0	--	44.9	16.3	37.8	1.0
South	21.7	64.2	10.8	3.3	--	53.3	20.0	25.0	1.7
West	15.9	58.0	21.7	4.3	--	44.9	14.5	40.6	--
For dress shoes:									
All respondents*	6.1	49.5	27.2	13.4	3.5	45.0	15.7	39.0	0.3
Age:									
18 to 24	5.8	61.5	19.2	11.5	1.9	32.7	32.7	34.6	--
25 to 34	4.3	47.3	28.0	14.0	5.4	47.3	14.0	38.7	--
35 to 49	7.1	47.6	28.6	14.3	2.4	45.2	15.5	39.3	--
50 to 64	8.6	50.0	24.1	13.8	1.7	46.6	8.6	43.1	1.7
65 & over	--	34.8	47.8	8.7	8.7	60.9	4.3	34.8	--
Household income: (thous.)									
Under $25	8.6	55.5	21.9	12.5	1.6	44.5	14.8	39.8	0.8
$25 to $34.9	4.1	50.5	34.0	6.2	5.2	43.3	17.5	39.2	--
$35 to $49.9	8.1	40.5	24.3	21.6	5.4	48.6	10.8	40.5	--
$50 & over	--	21.4	50.0	21.4	7.1	42.9	21.4	35.7	--

*Bases cover 371 women who bought casual shoes in 1980 and expect to buy them in 1981, and 313 women who bought dress shoes and plan to buy them in 1981.

Athletic Footwear

Among the 604 women age 18 and over selected in the nationwide sample of adults, who were interviewed for Footwear News Magazine, 38.7% said they had purchased athletic footwear designed for a specific sport. The highest percentage of purchasers (over half) was noted among women in the 18-to-24 and 35-to-49 age groups, and among women with household incomes upwards of $25,000. Respondents in the West had the biggest percentage of athletic footwear customers noted on a regional basis—56.1% compared with a low of 28.2% in the Northeast.

(continued)

Athletic Footwear (continued)

Most women, particularly those who were 35 years of age and older, said they usually purchased their athletic shoes in department stores. Specialty athletic footwear stores were the second most popular outlet type, and were the Number One outlet for women 18 to 24 years of age.

Purchase Patterns For Athletic Footwear By Age & Income
(% of Female Respondents)

		Age				Household Income (thous.)		
	Total	18-24	25-34	35-49	50+	Under $25	$25-$34.9	$35+
Purchasers of athletic footwear	38.7%	54.5%	52.5%	39.3%	20.3%	31.5%	46.9%	45.3%
Usual place of purchase of athletic footwear:								
Total female purchasers	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Department store	28.6	14.6	30.6	30.5	35.0	35.5	21.1	26.5
Specialty athletic footwear store	21.4	29.2	24.7	20.3	7.5	14.0	26.3	32.3
Shoe store-conventional	13.7	10.4	15.3	11.9	17.5	17.2	11.8	5.9
Shoe store-discount	8.1	8.3	4.7	11.9	10.0	9.7	9.2	--
Sporting goods store								
General-line	16.7	16.7	12.9	22.0	17.5	12.9	17.1	23.5
Specialty-line	9.4	18.8	10.6	1.7	7.5	8.6	11.8	11.8
Other outlets and no answer	2.1	2.0	1.2	1.7	5.0	2.1	2.7	--

Of those women in the survey who were identified as sports-minded, and had purchased functional athletic footwear for themselves at sometime, almost 81% had purchased one or more pair in 1980. A lower level of purchases was indicated for 1981, however, as overall only 69% had plans to buy athletic footwear as of the time of the interview at the end of 1980. In 1980, 36% of the women who bought any athletic shoes bought more than one pair; for 1981, about 22% said they would buy more than one pair.

Percent of Women Who Had Ever Bought Athletic Footwear For Themselves Who Purchased in 1980 & Percent Who Expect To Buy Athletic Footwear in 1981

		Age				Household Income (thous.)		
	Total	18-24	25-34	35-49	50+	Under $25	$25-$34.9	$35+
Women who ever purchased athletic footwear	100.0%	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Bought 1 or more pair in 1980	80.8	85.4	82.4	81.4	70.0	76.3	85.5	82.4
Expect to buy in 1981	69.2	81.2	69.4	71.2	50.0	65.6	75.0	70.6

BUYING HABITS—WOMEN

Attitudes Toward Imports

The survey among a sample of 604 adult women throughout the country, conducted for Footwear News Magazine developed informational attitudes toward imported shoes in general, and those from specific countries, as noted below.

	% Who Ever Look At Labels To See Country Where Shoes Were Made	% Who Will Not Buy Shoes From Specific Countries	Countries Most Frequently Mentioned (In order of no. of mentions*)
Total respondents—	64.6%	18.7%	
Age:			
18 - 24	46.6	11.4	Taiwan, Japan (72.7%)
25 - 34	64.8	13.0	Japan, Korea, Taiwan, Italy (60.0%)
35 - 49	70.0	26.7	Taiwan, Japan, Korea, "Any"** (54.2%)
50 - 64	62.5	20.6	"Any," Taiwan, Japan (63.9%)
65+	78.7	18.0	"Any," Italy, Taiwan (76.9%)
Household income:			
Under $35,000	63.9	18.2	Taiwan, "Any," Japan (56.0%)
$35,000+	69.3	20.0	Taiwan, Japan, Korea (66.6%)
Region:			
Northeast	75.4	25.4	
North Central	62.1	20.7	
South	57.9	12.3	
West	66.3	18.4	
Fashion forerunner	60.0	15.7	

*Percentages represent the share of total mentions of all countries represented by the listed countries.

**Covers response "any country outside of the U.S."

Close to a third of the women respondents, overall, said all of the dress or casual shoes they purchased in 1980 were made in this country, but there was a wide range in answers based on age groups—rising from only 16% of women 18 to 24 to over 57% of those 65 and older.

The biggest percentage of women who said that less than half of the dress and casual shoes purchased last year were made in the U.S. was noted among those 25 to 49 years of age (25%). Women who are fashion forerunners are less inclined than other women to buy only U.S.-made shoes.

Usual Place of Purchase

The biggest percentage of women interviewed in the Footwear News Magazine survey said they usually buy their dress and casual shoes in regular-price shoe stores, with department stores mentioned by the second largest group.

Differences in the pattern were noted in terms of respondent characteristics and by region.

(continued)

Usual Place of Purchase (continued)

Store Types Where Casual & Dress Shoes Are Usually Bought
(% of Respondents)

		Age Group					Income (thous.)			
	Total	18-24	25-34	35-49	50-64	65+	Under $25	$25-$34.9	$35-$49.9	$50 & Over
Women's casual shoes										
Total respondents	100.0%	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Reg.-price shoe store	43.0	54.5	42.0	40.0	36.8	54.1	44.7	41.4	35.7	52.6
Department store	28.3	23.9	35.8	27.3	27.2	16.4	23.1	32.1	41.1	21.1
Mass merchandiser	11.3	5.7	11.1	11.3	15.4	9.8	14.2	10.5	5.4	5.3
Discount shoe store	8.4	8.0	5.6	10.7	9.6	8.2	8.5	8.6	7.1	5.3
Apparel store	1.3	--	0.6	2.0	2.9	--	1.0	0.6	5.4	5.3
Discount store	4.1	3.4	3.1	5.3	3.7	6.6	4.7	2.5	3.6	10.5
Other outlets*	2.4	2.2	0.6	2.0	4.4	3.2	2.7	2.5	--	--
Women's dress shoes										
Total respondents	100.0%	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Reg.-price shoe store	49.5	59.1	50.6	46.0	40.4	65.6	50.2	50.0	37.5	47.4
Department store	26.7	19.3	30.2	27.3	29.4	16.4	23.7	30.2	32.1	26.3
Mass merchandiser	9.9	2.3	9.9	11.3	14.0	8.2	2.7	3.7	8.9	5.3
Discount shoe store	5.3	6.8	2.5	6.0	7.4	3.3	5.1	4.3	7.1	5.3
Apparel store	3.6	8.0	3.1	4.0	2.9	--	2.7	3.7	8.9	5.3
Discount store	3.0	2.3	1.9	4.0	3.7	3.3	2.7	1.9	5.4	10.5
Other outlets*	1.3	1.1	1.8	0.7	0.7	2.2	2.7	--	--	--

*Includes mail order, PX/Base Exchanges, sporting goods stores and other outlets.
The balance have no preference or do not buy the specified shoe type.

Store Selection

In selecting a store where shoes are usually purchased, based on interviews for Foorwear News Magazine, women rated these considerations in order of importance: 1st: price, 2nd: fashion or style; 3rd: convenience of store location; 4th: sales help.

Relative importance of these factors showed some variations in terms of demographic characteristics. To women age 25 to 34, price is more important in selecting a shoe retailer than to female customers in other age groups. Younger women 18 to 24 generally give higher priority to fashion or style selection than to price in selecting a store, as do women classified as fashion forerunners, and those with household incomes of $35,000 and up. Store location and sales help are stressed more by women 65 and over than by younger women.

Women generally visit more stores when shopping for shoes than do men—averaging 3.49 stores versus 3.11. Younger customers are the biggest shoppers. Among women surveyed who were 18 to 24, an average of 4.18 stores were usually visited before a final buying decision on shoes was made. In the 25-34 age group, the average number of stores shopped numbered 3.66. Among women most interested in fashion, the store average was 3.62.

BUYING HABITS

Teens—(Female)

In September 1980, Seventeen Magazine conducted a mail survey among several of their Consumer Panels, representing a cross section of the teenage market and their spending for back-to-school wardrobe.

Findings were represented by a total of 9,176,000 teenage-female students in the U.S., who spent $6.8 billion on their back-to-school wardrobes. Expenditures for footwear represented 12.1% of the total. About 92% of the teenagers bought shoes, averaging close to three pairs per purchaser, for which they spent $677.1 million. Boots were purchased by about 25% of the teenagers. The per capita average was 1.17 pairs, and total spending for boots amounted to $148.0 million.

Details on footwear purchases by type were reported as follows:

Purchases of Footwear By Teenage Students (Female)
For Back-To-School, 1980

Footwear Type	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Casual-Flats	4,736	5,451	$157,202
-Heels	1,823	2,194	65,317
Dress-up-Heels	3,546	4,365	130,941
-Flats	956	1,053	33,040
Sandals/Thongs	1,547	1,874	30,831
Clogs	1,978	2,127	58,608
Sneakers-Jogging	2,674	2,907	78,465
-Tennis	2,175	2,360	56,089
Wooden bottom (not clogs)	438	451	9,369
Formal evening	620	672	21,617
Moccasin-type shoes	1,116	1,172	32,000
Slippers	399	428	3,595
Boots-Leather/Suede	594	622	31,349
-Work/Desert	110	113	4,868
-Storm/Rain	253	253	7,000
-Western/Cowboy	1,477	1,502	97,639
-Ankle boots	153	160	7,195
Total girls buying footwear	8,584	27,704	$825,125
Total girls buying shoes	8,476	25,054	$677,074
Total girls buying boots	2,268	2,650	$148,051

Source: Seventeen's Back-To-School Study (1981).

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now--1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store types.

THE CUSTOMER SPEAKS--1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. ($15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance and degree of social activity. (204 pages, $20.00)

DEPARTMENT STORE SALES (1980 Edition available now--1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS: Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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